

THIS IS A REFRESH OF SUPPLY ARRANGEMENT # EN578-092644/000/CX.

There is a security requirement associated with this Refresh. Please refer to Part 4, article 3 "Security Requirement".

Enquiries on the Request for Supply Arrangement document were addressed during the original solicitation period in 2010. The Contracting Authority will not respond to new enquiries. For your information and to assist you in preparing your arrangement, copies of the Questions and Answers released during the original solicitation period are available through Access to Information.

This refresh permits new suppliers to submit arrangements and potentially become Supply Arrangement Holders, and allow current Supply Arrangement Holders to potentially qualify additional or replacement resources, up to a total of three (3) for each category of personnel. New fully compliant suppliers will be issued Supply Arrangements and their names will be added to the existing Supply Arrangement Holder list on the condition that they meet all of the requirements of the original Request for Supply Arrangements, which are included in this document. Current Supply Arrangement Holders with fully compliant additional or replacement resources will receive an amendment to their existing Supply Arrangement.

Current Supply Arrangement Holders attempting to qualify additional or replacement resources do not need to submit a full arrangement, or resubmit their original arrangement. Current Supply Arrangement Holders only need to address the requirements outlined in M.2, M.3, R.1, and the Security Requirements in their arrangement in response to the refresh. Note: any requests to qualify replacement resources must be accompanied by a supporting justification which is in accordance with Certification 1.4 Status and Availability of Resources. Failure to identify a reason which is in accordance with the Status and Availability of Resources certification will render the replacement resource non-compliant.

NOTE: The current "Best Value Supplier" will continue to be the Best Value Supplier for the entire duration of the Supply Arrangements, unless the Best Value Supplier's arrangement is withdrawn or unless "Best Value Supplier" status is removed from the Supplier. This Supply Arrangement refresh does not affect the "Best Value Supplier's" status.

EVENTS MANAGEMENT SERVICES

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PART 1 GENERAL INFORMATION

1. Introduction

The Government of Canada has launched a program to improve the way the government does business, with a focus on identifying and implementing innovative ways to deliver goods and services smarter, faster, and at reduced costs. The Government is using strategic practices to identify suppliers who offer the best price/quality value proposition to Canada and to accelerate cost savings across commodity areas. This work is guided by the Government of Canada's principles of transparency; accountability and high ethical conduct in doing business.

The Request for Supply Arrangements (RFSA) template is divided into six parts:

- a) Part 1, General Information;
- b) Part 2, Supplier Instructions;
- c) Part 3, Arrangement Preparation Instructions;
- d) Part 4, Evaluation Procedures and Basis of Selection;
- e) Part 5, Certifications, and
- f) Part 6:
6A, Supply Arrangement,
6B, Bid Solicitation,
6C, Resulting Contract Clauses; and,

the Annexes.

Part 1: provides a general description of the requirement;

Part 2: provides the instructions applicable to the clauses and conditions of the RFSA and states that the Supplier agrees to be bound by the clauses and conditions contained in all parts of the RFSA;

Part 3: provides suppliers with instructions on how to prepare their arrangement to address the evaluation criteria specified;

Part 4: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement, the security requirement, if applicable, and the basis of selection;

Part 5: includes the certifications to be provided;

Part 6A: includes the Supply Arrangement (SA) with the applicable clauses and conditions;

Part 6B: includes the instructions for the bid solicitation process within the scope of the SA;

Part 6C: includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Check List, the Detailed Process for Requests for Proposals Issued Under the Supply Arrangements, and the Evaluation Grids. The Appendices include the List of Environmental Attributes, the Pricing and Evaluation Workbook and the Statement of Work for Sample Event for the Rated Technical Criteria R.2.

2. Summary

The Government of Canada requires the provision of a full range of events management services, for events which may include, but are not limited to meetings, conferences, workshops, summits, consultations, round tables, award ceremonies, galas and opening ceremonies on an "as and when requested basis".

These services will be provided to the Communication Procurement Directorate (CPD) of Public Works and Government Services Canada (PWGSC) on behalf of Government of Canada departments and agencies listed under Schedules I, I.I, II and III of the *Financial Administration Act*. As a result of this competitive process, PWGSC will authorize Supply Arrangements (SAs). This solicitation will also be used to establish a separate list of qualified Aboriginal Set-Aside Suppliers under the Set-Aside Program for Aboriginal Business (SPAB).

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

3. Security Requirement

There is a security requirement associated with the requirement of the Supply Arrangement. For additional information, see Part 4 - Evaluation Procedures and Basis of Selection, and Part 6 - Supply Arrangement and Resulting Contract Clauses.

4. Canadian Content

The goods and/or services covered by the Supply Arrangement are limited to Canadian goods and/or services as defined in clause A3050T.

SACC Manual clause A3050T (2008-05-12) Canadian Content Definition

5. Communications Notification

As a courtesy, the Government of Canada requests that successful suppliers notify the Supply Arrangement Authority in advance of their intention to make public an announcement related to the authorization of a supply arrangement.

6. Debriefings

After authorization of a supply arrangement, suppliers may request a debriefing on the results of the request for supply arrangements. Suppliers should make the request to the Supply Arrangement Authority within 15 working days of receipt of notification that their arrangement was unsuccessful. The debriefing will be provided in writing.

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7. Aboriginal and Non-Aboriginal Suppliers

A portion of this procurement has been set aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB), as detailed in Annex 9.4 of the Supply Manual entitled "Requirements for the Set-aside Program for Aboriginal Business". This RFSA will be used to establish SAs with both Non-Aboriginal and Aboriginal firms.

Further to Article 1802 of the Agreement on Internal Trade (AIT), AIT does not apply to the portion of this procurement set aside under the federal government's PSAB.

NOTE: Competition must exist in order for PWGSC-CPD to issue Requests for Proposals under the Supply Arrangements. Therefore, if less than two suppliers qualify for Aboriginal Set-Aside Supply Arrangements under the Set-Aside Program for Aboriginal Business, there will not be any RFPs issued as Set-Aside procurements under the resulting Supply Arrangements.

8. Supply Arrangements

Supply Arrangements are non-binding agreements between Public Works and Government Services Canada (PWGSC) and suppliers to provide a range of services on an "as and when requested basis". Suppliers who are issued a Supply Arrangement will form a list of qualified suppliers from which PWGSC can solicit bids based on the specific requirements of the Government of Canada. Supply arrangements include a set of predetermined terms and conditions that will apply to any subsequent Contract. The resulting Supply Arrangements will include all-inclusive ceiling hourly rates. The Supply Arrangement will typically be used for requirements above **\$25,000.00**, including GST and HST. Individual contracts awarded under the Supply Arrangement cannot exceed **\$400,000.00**, excluding GST and HST.

Two (2) lists of qualified suppliers (one for Non-Aboriginal and Aboriginal firms, and another for solely Aboriginal firms) will be established for the provision of events management services. PWGSC anticipates authorizing Supply Arrangements with all qualified suppliers.

The period for awarding contracts under the Supply Arrangement is from August 1, 2012 to July 31, 2013.

The scope of the services covered by the Supply Arrangements are detailed in the attached Annex "A" - Statement of Work.

8.1 Solicitation Processes Under the Supply Arrangements

1. For requirements valued up to \$100,000 excluding applicable taxes, the following Supply Arrangement Holders will be invited to participate in the solicitation process:
 - The "Best Value Supplier", as determined in accordance with the Basis of Selection at article 2 in Part 3 in the original solicitation;
 - One Supply Arrangement Holder as recommended by the Client; and
 - One Supply Arrangement Holder selected at random by PWGSC - Communication Procurement Directorate (CPD). The "random" selection will be made using the RAND () function in Microsoft Excel.

This solicitation process will be referred to as a "Mini Request for Proposal (Mini RFP)".

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2. For requirements valued at more than \$100,000 but less than \$400,000 excluding applicable taxes, all Supply Arrangement Holders will be invited to submit a proposal.

This solicitation process will be referred to as a "Request for Proposal (RFP) Under the Supply Arrangements".

3. For requirements valued at more than \$400,000 excluding applicable taxes, the Request for Proposal will be posted on the Government Electronic Tendering Service (GETS) and will be open to the industry.

9. Key Terms

Supply Arrangement - A supply arrangement is an arrangement between Canada and pre-qualified suppliers that allows identified users to solicit bids from a pool of pre-qualified suppliers for specific requirements within the scope of a supply arrangement. A supply arrangement is not a contract for the provision of the goods and services described in it and neither party is legally bound as a result of signing a supply arrangement alone. The intent of a supply arrangement is to establish a framework to permit expeditious processing of individual bid solicitations which result in legally binding contracts for the goods and services described in those bid solicitations.

Supply Arrangement Holder - A fully qualified Supplier (an individual or firm who submits an Arrangement in response to a Request for Supply Arrangement) who is subsequently issued and in possession of a Supply Arrangement.

Mini Request for Proposal (Mini RFP) - A Request for Proposal which is conducted for Events Management Services requirements valued up to \$100,000 excluding applicable taxes. Only three Supply Arrangement Holders are invited by e-mail to participate in the solicitation process: the "Best Value Supplier", one Supply Arrangement Holder as recommended by the Client, and one Supply Arrangement Holder Selected at random by PWGSC-CPD. The purpose of a Mini RFP is to procure a cost-effective solution for a requirement in a timely manner, which obtains best value for Canada.

Request for Proposal (RFP) Under the Supply Arrangements - A Request for Proposal which is conducted for Events Management Services requirements valued between \$100,000 and \$400,000 excluding applicable taxes. All Supply Arrangement Holders are invited by e-mail to participate in the solicitation process. The purpose of an RFP Under the Supply Arrangements is to procure a cost-effective solution for a requirement in a timely manner, which obtains best value for Canada, and which addresses the potentially unique nature of medium-sized Events Management Services requirements.

Best Value Supplier - The fully responsive Supplier that achieved the lowest calculated cost-per-point following the technical and financial evaluations of the original solicitation. This Supplier is invited to submit a proposal for each Mini RFP, in addition to all RFPs Under the Supply Arrangements. This Supply Arrangement Refresh does not affect the current "Best Value Supplier's" status.

Contract - An agreement between two or more persons, which creates an obligation to do or not to do a particular thing. Its essentials are competent parties, subject matter, a legal consideration, mutuality of agreement and mutuality of obligation.

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PART 2 SUPPLIER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Supply Arrangements (RFSA) by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada.

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the clauses and conditions of the Supply Arrangement and resulting contract(s).

The 2008 (2010-01-11) Standard Instructions - Request for Supply Arrangements - Goods or Services, are incorporated by reference into and form part of the RFSA.

Subsection 4.4 of 2008, Standard Instructions - Request for Supply Arrangements - Goods or Services, is amended as follows:

Delete: sixty (60) days
Insert: one hundred and twenty (120) days

1.1 Basis for Canada's Ownership of Intellectual Property

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract(s) 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.

1.2 SACC Manual Clauses

SACC Manual clause S0030T (2008-12-12) Financial Capability

2. Submission of Arrangements

Arrangements must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated below:

Bids must be submitted by 2:00 pm Eastern Daylight Savings Time (EDT) on Thursday, July 5, 2012 to:

Bid Receiving (HQ)
Department of Public Works and Government Services
Bid Receiving Unit
Portage III, 0A1
11 Laurier Street
Gatineau, Quebec
For couriers: J8X 4A6 For regular mail: K1A 0S5
Telephone (819) 956-3370
Fax No.: (819) 997-9776

Due to the nature of the Request for Supply Arrangements, transmission of arrangements by facsimile or electronic mail to PWGSC will not be accepted.

3. Enquiries - Request for Supply Arrangements

Enquiries on the Request for Supply Arrangement document were addressed during the original solicitation period in 2010. The Contracting Authority will not respond to new enquiries. For your information and to assist you in preparing your arrangement, copies of the Questions and Answers released during the original solicitation period are available through Access to Information.

4. Applicable Laws

The Supply Arrangement and any contract resulting from the Supply Arrangement must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their arrangement, 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 suppliers.

5. Environmental Considerations

Canada is committed to greening its supply chain. In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired.

Environmentally preferable goods and services are those that have a lesser or reduced impact on the environment over the life cycle of the good or service, when compared with competing goods or services serving the same purpose. Environmental performance considerations include, among other things: the reduction of greenhouse gas emissions and air contaminants; improved energy and water efficiency; reduced waste and support reuse and recycling; the use of renewable resources; reduced hazardous waste; and reduced toxic and hazardous substances.

In accordance with the Policy on Green Procurement, for this solicitation:

- Suppliers are encouraged to offer or suggest green solutions whenever possible.
- Suppliers are requested to provide all correspondence including (but not limited to) documents, reports and invoices in electronic format unless otherwise specified by the Contracting Authority or Project Authority, thereby reducing printed material.
- The paper format of the arrangement should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content.
- Suppliers should recycle (shred) unneeded copies of non-classified/secure documents (taking into consideration the Security Requirements).

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- Product components used in performing the services should be recyclable and/or reusable, whenever possible.
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PART 3 ARRANGEMENT PREPARATION INSTRUCTIONS

1. Arrangement Preparation Instructions

Canada requests that suppliers provide their arrangement in separately bound sections as follows:

Section I: Technical Arrangement (5 hard copies and 1 soft copy on CD, DVD or USB key)

Section II: Financial Arrangement (2 hard copies and 1 soft copy on CD, DVD or USB key)

Section III: Certifications (2 hard copies)

Suppliers should clearly label all hard and soft copies of their arrangements with their name and the solicitation number.

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.

Any supplier wishing to receive a soft copy of Appendix "2" Pricing and Evaluation Workbook to assist with the completion of an arrangement, should contact the Supply Arrangement Authority identified herein.

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

All arrangements become the property of Canada and will not be returned to the suppliers.

Canada requests that suppliers follow the format instructions described below in the preparation of their arrangement.

- a) Use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b) Use a numbering system that corresponds to the bid solicitation; and
- c) No plastic covers or binders, if possible. Please be considerate of the environment.

Section I: Technical Arrangement

In their technical arrangement, suppliers should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Arrangement

Suppliers must submit their financial arrangement in accordance with Annex "B" Basis of Payment and Appendix "2", Pricing and Evaluation Workbook. **The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.**

Section III: Certifications

Suppliers must submit the certifications required under Part 5.

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PART 4 EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- a) Arrangements will be assessed in accordance with the entire requirement of the Request for Supply Arrangements including the technical and financial evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the arrangements.

1.1. Technical Evaluation

Current Supply Arrangement Holders attempting to qualify additional or replacement resources do not need to submit a full arrangement, or resubmit their original arrangement. Current Supply Arrangement Holders only need to address the requirements outlined in M.2, M.3, R.1, and the Security Requirements in their arrangement in response to the refresh.

1.1.1 Mandatory Technical Criteria

M.1 Financial Proposal

The Supplier must provide costing information strictly in accordance with the Basis of Payment stipulated in Annex "B" and Appendix "2".

M.2 Proposed Resources

The Supplier must identify at least one (1) but no more than three (3) individuals for each of the following categories of personnel. All of the individuals proposed must be employees of the Supplier. For the purposes of this Mandatory Requirement, an "employee" is defined as an individual who has been hired by the Supplier to perform work for the firm on a full-time basis, and who is not a freelancer, contract, sub-contracted, or part-time resource.

The same resource may be proposed for more than one category of personnel, however the resource must meet all of the criteria for each category (as per the definitions below) and the rates proposed in Appendix "2" for all categories for that resource must be identical.

For example, if three different individuals are proposed for the Senior Event Manager position, and three individuals (one of which was also proposed for the Senior Event Manager position) have also been proposed for the Event Manager position, the resource proposed for both positions must meet the criteria below for both the Senior Event Manager and the Event Manager, and the rates proposed in Appendix "2" for both the Senior Event Manager and the Event Manager positions must be the same.

The **Senior Event Manager** must meet all of the following:

- at least three (3) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates);

- has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
- has managed events with delegates from either: more than one province or territory; or more than one country; or both;
- has managed events that require one or more of the firm's personnel to be on-site for three (3) days or more;
- has managed events with a minimum of one hundred (100) delegates; and
- has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications.

The **Event Manager** must meet all of the following:

- at least two (2) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates);
- has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
- has managed events with delegates from either: more than one province or territory; or more than one country; or both;
- has managed events that require one or more of the firm's personnel to be on-site for three (3) days or more;
- has managed events with a minimum of one hundred (100) delegates; and
- has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications.

An **Event Coordinator** must meet all of the following:

- at least one (1) year of experience in coordinating the execution of events;
- has coordinated events where their firm's assigned portion of the overall budget was at least \$100,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
- has coordinated events with delegates from either: more than one province or territory; or more than one country; or both;
- has coordinated events that require one or more of the firm's personnel to be on-site for two (2) days or more;
- has coordinated events with a minimum of fifty (50) delegates; and
- has coordinated the provision of two (2) or more of the following: accommodations, hospitality, transportation, registration and printing or publications.

The **Financial Manager** must meet the following:

- at least three (3) years of experience providing financial management in Special Events, Hospitality Management, Hotel Management or Tourism fields for projects where the firm was responsible for the receipt, management and disbursement of funds received from the client, from delegate registration revenues, and from any other source for projects with a total cost of \$100,000 or more.

The **Event Assistant** must meet all of the following:

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- at least six (6) months of experience in assisting with the coordination and execution of events;
 - has assisted in the coordination of events where their firm's assigned portion of the overall budget was at least \$50,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
 - has assisted in the coordination of events with delegates from either: more than one province or territory; or more than one country; or both;
 - has assisted in the coordination of events that require one or more of the firm's personnel to be on-site for two (2) days or more;
 - has assisted in the coordination of events with a minimum of fifty (50) delegates; and
 - has assisted in the provision of one (1) or more of the following: accommodations, hospitality, transportation, registration and printing or publications.

The Supplier must clearly demonstrate how each proposed resource meets the applicable category definition above.

Note: If a current Supply Arrangement Holder intends to qualify one or more replacement resources, the supplier must identify the name of the resource(s) to be substituted, the name(s) of the proposed substitute(s) and the applicable reason(s) for the substitution(s). Failure to identify a reason that is identified as acceptable within certification 1.4 Status and Availability of Resources of the original solicitation document will render the replacement resource non-responsive. A proposed substitute must be deemed by the evaluation team as having equivalent or better qualifications and experience to the original proposed resource. The supplier must clearly demonstrate in its arrangement how each proposed substitute meets the applicable category definition above.

This Mandatory Requirement will be rated in R.1.

M.3 Events Management Projects

The Supplier must provide five (5) events management projects, where the event dates were after January 1, 2004. Each of the Senior Event Managers, Event Managers, Event Coordinators, Financial Managers and Event Assistants identified in M.2 must have been involved in the planning of at least one (1) event. An event may be used to demonstrate the experience of more than one resource, however no more than five (5) projects are to be submitted. At a minimum, three (3) of the five (5) projects must demonstrate an ability of the Supplier to provide event planning services where the profile of participants is varied. "Participant" is defined as including, but not restricted to, a potential audience, actual delegate, speaker/presenter, moderator, session chair, or member of a client group. "Varied" is defined as including three or more of the following profiles - general public, senior citizens, youth, senior executives, parliamentary officials, VIPs, Veterans, etc. - within one event.

The Supplier must provide the following information:

- a) Name of the project/event;
- b) Duration of the event, including start and end dates;
- c) Proposed resource(s) to be evaluated; and
- d) Profile of participants (as defined above) at the event.

Note: If a current Supply Arrangement Holder intends to qualify one or more additional resources, or one or more replacement resources, the supplier must provide (1) events management project for each additional or replacement resource to a maximum of five (5) events management projects,

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where the event dates were after January 1, 2004. An event may be used to demonstrate the experience of more than one resource, however no more than five (5) projects are to be submitted.

This Mandatory Requirement will also be rated under R.1.

M.4 Language

The Supplier must confirm that its firm is capable of providing services in both official languages (English and French). As such, the Supplier must include a duly signed and dated copy of the following Certification in the Technical Proposal portion of the Arrangement submission.

<u>Language Certification:</u>	
The Supplier hereby certifies that its firm is capable of providing services in both official languages (English and French).	
_____	_____
<i>Signature</i>	<i>Date</i>

ARRANGEMENTS NOT MEETING ALL OF THE MANDATORY REQUIREMENTS WILL BE GIVEN NO FURTHER CONSIDERATION

1.1.2 Point Rated Technical Criteria

For a detailed description on how the points will be awarded, please see the attached evaluation grid.

R.1 Experience of Proposed Resources

Maximum possible points: 540 points

Minimum acceptable points: 270

The resources proposed in accordance with M.2 will be evaluated on their experience as demonstrated in the events management projects provided in accordance with M.3.

The Supplier should provide the curriculum vitae of each proposed resource outlining their qualifications, training, education, language capability, related work experience and expertise in planning and organizing events and which demonstrates their capability to provide event management services as described in the Statement of Work at Annex "A". The Curriculum Vitae of each proposed resource should substantiate the information provided in this rated requirement. Proof of professional designations, provincial licences, memberships, or course participation should be provided.

The Supplier should also provide the following information for each of the five (5) events identified in M.3:

- Description of the project;

- Dollar value, and initial budget;
- Number of attendees at the event;
- Detailed description of the work performed by each proposed resource to be evaluated; and
- A letter of reference from the client department/commission/agency/firm for the project.

Points will be allocated as follows:

A) Projects (maximum 100 points):

a) Project Scope (maximum 20 points per project):

Project is similar in scope to the Statement of Work at Annex "A". "Similar in scope" is defined as having a dollar value which is more than \$25,000.00, duration is more than two (2) days, and more than 50 delegates in attendance.

Points are to be allocated as follows:

- None of the above criteria met - 0 points;
- Only one (1) of the above criteria met (even if exceeded) - 10 points;
- Two (2) of the three (3) criteria met, where the dollar value is up to \$100,000.00, three (3) days, and 100 delegates in attendance - 14 points;
- Two (2) of the three (3) criteria met, with any one (1) criteria exceeding the \$100,000.00, three (3) days, or 100 delegates - 16 points;
- All three (3) of the criteria met, where the dollar value is up to \$100,000.00, three (3) days, and 100 delegates in attendance - 18 points;
- All three (3) of the criteria met, with any one (1) criteria exceeding the \$100,000.00, three (3) days, or 100 delegates - 20 points.

Partial points will not be awarded. Points are not cumulative for one project or among multiple projects.

B) Proposed Resources (maximum 440 points):

i) Experience of Proposed Resources - as demonstrated through the projects only (maximum 170 points):

The proposed resources for each category of personnel will be evaluated according to their experience as demonstrated through the applicable projects submitted in accordance with M.3.

Points will be allocated as follows:

- Senior Event Manager - demonstration of leadership, problem solving, communication and organization skills (maximum 50 points);
- Event Manager - demonstration of leadership, problem solving, communication and organization skills (maximum 40 points);
- Event Coordinator - demonstration of communication and organization skills (maximum 30 points);
- Financial Manager - demonstration of financial management and organization skills (maximum 30 points);
- Event Assistant - demonstration of communication and organization skills (maximum 20 points).

If multiple resources are proposed within a single category, the points for each resource within the category will be averaged to obtain a final score for this sub-criteria.

ii) Experience of Proposed Resources - in years (maximum 90 points):

The Senior Event Manager(s) and Event Manager(s) will each be evaluated according to the number of years of experience obtained above and beyond the stated minimums in M.2 as follows:

- Stated minimum up to an additional two (2) years - 5 points;
- Between three (3) and five (5) additional years of experience - 10 points;
- Between six (6) and ten (10) additional years of experience - 15 points
- Between eleven (11) and fifteen (15) additional years of experience - 20 points;
- Sixteen (16) or more additional years of experience - 25 points.

The Financial Manager(s) and the Event Coordinator(s) will each be evaluated according to the number of years of experience obtained above and beyond the stated minimums in M.2 as follows:

- Stated minimum up to an additional two (2) years - 5 points;
- Between three (3) and five (5) additional years of experience - 10 points;
- Six (6) or more additional years of experience - 15 points.

The Event Assistant(s) will be evaluated according to the number of years of experience obtained above and beyond the stated minimums in M.2 as follows:

- Stated minimum up to an additional two (2) years - 5 points;
- Three (3) or more additional years of experience - 10 points.

Partial points will not be awarded. Points are not cumulative for a particular resource or among multiple resources. A maximum of 25 points will be awarded in the Senior Event Manager category, 25 points in the Event Manager category, 15 points in the Financial Manager category, 15 points in the Event Coordinator category, and 10 points in the Event Assistant category.

iii) Professional Designations (maximum 30 points):

Possession by a proposed resource of a valid Certified Meeting Manager (CMM) or Certified Meeting Professional (CMP) designation (15 points per resource possessing either of the designations, maximum 15 points per category of personnel. No points will be awarded if a resource is not in possession of a valid designation. No additional points will be awarded if a resource is in possession of both designations. Partial points will not be awarded.)

iv) Education (maximum 150 points):

Possession by a proposed resource of the following:

- a university degree or college diploma in a related discipline (e.g. Hospitality Management, Hotel management, Tourism, etc.) (20 points); or
- a university degree or college diploma in an unrelated discipline (10 points); or
- a high-school diploma with demonstration of attendance at a minimum of two (2) courses or seminars related to event planning within the past five (5) years (5 points).

Points are not cumulative for a particular resource or among multiple resources. A maximum of twenty (20) points per category of personnel will be awarded.

An additional ten (10) points will be awarded for any resource having taken or taught a minimum of two (2) different courses or seminars related to event planning or event management within the past five (5) years. Points are not cumulative for a particular resource or among multiple resources. A maximum of fifty (50) points total for teaching of or attendance at courses or seminars will be awarded.

R.2 Sample Event - Approach, Methodology, and Risk Mitigation Plan

Maximum possible points: 200 points
Minimum acceptable points: 140 points

The Supplier should provide an approach, methodology, and risk mitigation plan outlining the execution of the sample event described in Appendix "3".

The Supplier should submit a detailed work plan that includes the following:

- a) All of the tasks to be performed. For each individual task, the proposed resource(s) and the level of effort (in hours) to be expended by each resource should be identified (maximum 80 points);
- b) All anticipated expenses (by expense name only, no dollar amounts are to be included), categorized as follows - 'Direct Expenses', 'Subcontracting', 'Travel and Living (Supplier)' as per the definitions in Annex "B" (maximum 40 points). See example below.;
- c) Scheduling (timelines), critical points, and key milestones (maximum 40 points); and
- d) Risk mitigation plan (possible problems or risks associated with the sample event, and the proposed plan to prevent these problems or risks from occurring) (maximum 40 points).

Example for b):

<i>Direct Expenses</i>	<i>Subcontracting</i>	<i>Travel and Living (Supplier)</i>
<i>Badges and lanyards</i>	<i>Hospitality</i>	<i>Flights</i>
<i>Participant packages</i>	<i>Simultaneous Interpretation</i>	<i>Meals</i>
<i>etc.</i>	<i>etc.</i>	<i>etc.</i>

The Supplier should complete the following table as part of their response to this rated requirement. This table will be verified against the Supplier's response for the 'Total Level of Effort in Hours for the Sample Event' column in Appendix 2 - Pricing and Evaluation Workbook.

Category of Service	Total Level of Effort for All Proposed Resources Within Each Category of Service for the Sample Event
Senior Event Manager	
Event Manager	
Event Coordinator	
Financial Manager	
Event Assistant	
Total	

Suppliers are reminded that prices must appear in the financial proposal only and therefore no pricing is to be included with the work plan. Any supplier who includes pricing in the Technical Arrangement portion of their arrangement will be declared non-responsive and will not be given further consideration.

R.3 Experience of the Firm

Maximum possible points: 110 points

The Supplier should provide the following information as it pertains to the firm:

- a) Number of years in business, including number of years specializing in the provision of events management services (5 points for every 5 full years in business to a maximum of 30 points and 5 points for every 5 full years in business specializing in events management services to a maximum of 30 points. Partial points will not be awarded.);
- b) In-house capabilities and niche market specializations as they pertain to events management services (Certified Management Accountants, Certified General Accountants, Certified Financial Accountants, IT software programmers, sponsorship and exhibit sales executives, risk management specialists, graphic designers, publications managers, etc) (10 points for every niche market specialization identified with supporting information, to a maximum of 50 points. Partial points will not be awarded.).

The Supplier should also provide the URL address of any Internet site(s) maintained by the Supplier which is/are accessible by Federal Government Departments, Commissions, and Agencies and which will provide information on the services available on this Supply Arrangement and the Supplier's qualifications to provide these services. No points will be awarded for provision of any URL addresses.

R.4 Environmental Considerations

Maximum possible points: 20 points

The Supplier should provide the following:

- An existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations);
- An existing or proposed proposed action plan for energy sourcing (measures taken to improve energy efficiency, intended use of alternative fuel/power sources if the Supplier's premises is owned); and
- An existing or proposed proposed action plan for materials/equipment sourcing (intended use of recycled or reused products, waste management strategy); and
- An existing or proposed action plan for transportation logistics (minimization of travel, use of green hotels).

Provision of each of the above is worth five (5) points. Partial points will not be awarded.

The Supplier should also provide a listing of environmental attributes for its firm. This will not be evaluated but will form part of any resulting Supply Arrangement.

2. Basis of Selection - Supply Arrangements

1. To be declared responsive, an arrangement must:

- a) comply with all the requirements of the Request for Supply Arrangements (RFSA); and
- b) meet all mandatory technical evaluation criteria; and
- c) obtain the required minimum of 50 percent for R.1 and 70 percent for R.2. There is no required minimum for R.3 or R.4. The rating is performed on a scale of 870 points.

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

3. All fully responsive suppliers and all fully responsive Aboriginal suppliers will be recommended for Supply Arrangement authorization. A separate list will be created for Aboriginal suppliers under the Set-Aside Program for Aboriginal Business.

4. "Best Value Supplier" Determination:

The current "Best Value Supplier" will continue to be the Best Value Supplier for the entire duration of the Supply Arrangements, unless the Best Value Supplier's arrangement is withdrawn or unless "Best Value Supplier" status is removed from the Supplier. This Supply Arrangement refresh does not affect the "Best Value Supplier's" status.

3. Security Requirement

1. Before issuance of a supply arrangement, the following conditions must be met:

- (a) the Supplier must hold a valid organization security clearance as indicated in 6A - Supply Arrangement;
- (b) the Supplier's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 6A - Supply Arrangements;
- (c) The Supplier must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

2. For additional information on security requirements, suppliers should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents Web site.

NOTE: The Supply Arrangements will be authorized once the evaluation is complete and this will not be delayed to allow Suppliers to secure the required security clearance. It is the Supplier's responsibility to follow up with CISD to ensure that their clearance is in place.

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**PART 5
CERTIFICATIONS**

Suppliers must provide the required certifications to be issued a supply arrangement. Canada will declare an arrangement non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications suppliers provide to Canada is subject to verification by Canada during the arrangement evaluation period (before authorization of a supply arrangement) and after authorization of a supply arrangement. The Supply Arrangement Authority will have the right to ask for additional information to verify suppliers' compliance with the certifications before issuance of a supply arrangement. The arrangement will be declared non-responsive if any certification made by the Supplier is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Supply Arrangement Authority for additional information will also render the arrangement non-responsive.

1. Certifications Precedent to Issuance of a Supply Arrangement

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

1.1 Federal Contractors Program

1. The Federal Contractors Program (FCP) requires that some suppliers, including suppliers who are members of joint ventures, 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 the issuance of a supply arrangement. If the Supplier, or, if the Supplier 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 issuance of a supply arrangement.

Suppliers who have been declared ineligible contractors by Human Resources and Social 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 arrangements from ineligible contractors, including an arrangement from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Supplier 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 Supplier 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 Supplier, or, if the Supplier is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Supplier or the member of the joint venture

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

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- b) () is not subject to the FCP, being a regulated employer under the Employment Equity Act, S.C. 1995, c.44;
- c) () is subject to the requirements of FCP, having a workforce of 100 or more full-time or part-time permanent employees, 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;
- d) () is subject to FCP, and has a valid certificate number as follows: _____ (e.g. has not been declared ineligible contractor by HRSDC).

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

SIGNATURE

DATE

1.2 Former Public Servant Certification

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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, suppliers 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 up 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 Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means, in the context of the fee abatement formula, 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

Is the Supplier a FPS in receipt of a pension as defined above?

YES () NO ()

If so, the Supplier must provide the following information:

- a) name of the former public servant;
- b) date of termination of employment or retirement from the Public Service.

Work Force Reduction Program

Is the Supplier a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

YES () NO ()

If so, the Supplier must provide the following information:

- a) name of former public servant;
- b) conditions of the lump sum payment incentive;
- c) date of termination of employment;
- d) amount of lump sum payment;
- e) rate of pay on which lump sum payment is based;
- f) period of lump sum payment including start date, end date and number of weeks;
- g) 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 fee 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.

Certification

By submitting an arrangement, the Supplier certifies that the information submitted by the Supplier in response to the above requirements is accurate and complete.

SIGNATURE

DATE

1.3 Canadian Content Certification

1.3.1. SACC Manual clause A3050T (2010-01-11) Canadian Content Definition.

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1.3.2. This procurement is limited to Canadian services.

The Supplier certifies that:

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

SIGNATURE

DATE

1.4 Status and Availability of Resources

The Supplier certifies that, should it be issued a supply arrangement as a result of the Request for Supply Arrangements, every individual proposed in its arrangement will be available to perform the Work resulting from a contract as required by Canada's representatives and at the time specified in a contract or as agreed to with Canada's representatives. If for reasons beyond its control, the Supplier is unable to provide the services of an individual named in its arrangement, the Supplier may propose a substitute with similar qualifications and experience. The Supplier must advise the Supply Arrangement 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 Supplier: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

SIGNATURE

DATE

1.5 Education and Experience

The Supplier certifies that all the information provided in the résumés and supporting material submitted with its arrangement, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Supplier to be true and accurate. Furthermore, the Supplier warrants that every individual proposed by the Supplier for the requirement is capable of performing the Work described in the resulting contract.

SIGNATURE

DATE

1.6 Requirements for the Set-Aside for Aboriginal Business

The Supplier certifies that it:

- Wishes to be considered under the Set-Aside Program for Aboriginal Business. (Suppliers wishing to be considered must complete the additional certifications below.)
- Does not wish to be considered under the Set-Aside Program for Aboriginal Business.

SIGNATURE

DATE

1.6.1 Set-aside for Aboriginal Business

1. A portion of this procurement has been set aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB), as detailed in Annex 9.4 of the Supply Manual entitled "Requirements for the Set-aside Program for Aboriginal Business".

2. The Supplier:

- i) certifies that it meets, and will continue to meet throughout the duration of the Arrangement, the requirements described in the above-mentioned annex.
- ii) agrees that any subcontractor it engages under the Arrangement must satisfy the requirements described in the above-mentioned annex.
- iii) agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.

3. The Supplier must check the applicable box below:

- i) () The Supplier is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR

- i) () The Supplier is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.

4. The Supplier must check the applicable box below:

- i) () The Aboriginal business has fewer than six full-time employees.

OR

- i) () The Aboriginal business has six or more full-time employees.

5. The Supplier must, upon request by Canada, provide all information and evidence supporting this certification. The Supplier must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Supplier must provide all reasonably required facilities for any audits.

6. By submitting an arrangement, the Supplier certifies that the information submitted by the Supplier in response to the above requirements is accurate and complete.

1.6.2 Owner/Employee Certification - Set-aside for Aboriginal Business

The Supplier must provide the following certification for each owner and employee who is Aboriginal:

- 1. I am _____ (insert "an owner" and/or "a full-time employee") of _____ (insert name of business), and an Aboriginal person, as defined in Annex 9.4 of the Supply Manual entitled "Requirements for the Set-Aside Program for Aboriginal Business".
- 2. I certify that the above statement is true and consent to its verification upon request by Canada.

Printed name of owner and/or employee

Signature of owner and/or employee

Date

**PART 6
SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES**

A. SUPPLY ARRANGEMENT

1. Arrangement

The Supply Arrangement covers the Work described in the Statement of Work at Annex "A".

2. Security Requirement

- 1. The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening(DOS) with approved document Safeguarding Capabilities at the level of PROTECTED "A", issued by the Canadian Industrial Security Directorate, Public Works and Government Services Canada.
- 2. The Contractor personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC). Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by

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the CISD, PWGSC, the Contractor personnel MAY NOT HAVE ACCESS to PROTECTED information or assets, and MAY NOT ENTER sites where such information or assets are kept, without an escort.

3. The Contractor MUST NOT utilize its Information Technology systems to electronically process PROTECTED information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of PROTECTED "A".
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex "C";
 - b) Industrial Security Manual (Latest Edition).

3. Standard Clauses and Conditions

All clauses and conditions identified in the Supply Arrangement and resulting contract(s) by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada.

3.1 General Conditions

2020 (2010-01-11) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.

3.2 Supplementary General Conditions

4007 (2008-12-12) Canada to Own Intellectual Property Rights in Foreground Information, applies to and forms part of the Supply Arrangement.

4. Term of Supply Arrangement

4.1 Period of the Supply Arrangement

The period for awarding contracts under the Supply Arrangement is from August 1, 2012 to July 31, 2013.

5. Authorities

5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Paola Amaral
Senior Purchasing Assistant
Public Works and Government Services Canada
Acquisitions Branch
Communications Procurement Directorate

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360 Albert St., 12th Floor, #5
Ottawa, ON K1A 0S5

Telephone: 613-993-5642
Facsimile: 613-993-2581
E-mail address: paola.amaral@pwgsc-tpsgc.gc.ca

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable.

5.2 Project Authority

The Project Authority for the Supply Arrangement is identified in the contract issued under the Supply Arrangement.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a contract under the Supply Arrangement and is responsible for all the technical content of the Work under the resulting Contract.

5.3 Supplier's Representative

The Supplier's Representative for the Supply Arrangement is identified in the resulting Supply Arrangement and in any resulting contract under the Supply Arrangement.

5.3.1 Qualified Resources

The resources qualified to perform work under the Supply Arrangement are (To be inserted by the Supply Arrangement Authority prior to Supply Arrangement award. Columns may be deleted based on the number of resources qualified.):

	Resources		
	1	2*	3*
Senior Event Manager			
Event Manager			
Event Coordinator			
Financial Manager			
Event Assistant			

**Optional.*

5.3.1.1 Status and Availability of Resources

The Supplier certifies that, should it be issued a supply arrangement as a result of the request for supply arrangements, every individual proposed in the arrangement or individuals with similar qualifications and experience will be available for the term of the supply arrangement.

6. Identified User

The Identified User is Public Works and Government Services Canada (PWGSC) - Communication Procurement Directorate (CPD).

7. On-going Opportunity for Qualification

Since this is the last Refresh, there are no remaining opportunities for qualification under these Supply Arrangements.

8. Limitation of Contracts Awarded Under Supply Arrangements

There are two tiers of solicitation processes under the Supply Arrangements - Mini Request for Proposals (Mini RFP) and Request for Proposals (RFP) Under the Supply Arrangements.

A Mini RFP is used for requirements valued at more than \$25,000 including applicable taxes but less than \$100,000 excluding applicable taxes. The following Supply Arrangement Holders will be invited to participate in the solicitation process: the "Best Value Supplier", as determined in accordance with the Basis of Selection at article 2 in Part 4; one Supply Arrangement Holder as recommended by the client; and one Supply Arrangement Holder selected at random by PWGSC. The "random" selection will be made using the RAND () function in Microsoft Excel.

An RFP Under the Supply Arrangements is used for requirements valued at more than \$100,000 but less than \$400,000 excluding applicable taxes. All Supply Arrangement Holders will be invited to submit a proposal for this solicitation process.

Overall, individual contracts under the Supply Arrangements must not exceed **\$400,000.00** (Goods and Services Tax or Harmonized Sales Tax excluding).

9. Notification of Withdrawal from the Supply Arrangement

1. In the event that the SA Holder wishes to withdraw from this SA, the SA Holder will advise the PWGSC SA Authority, in writing of its desire to be removed from the SA Holders list and withdraw the SA. After receipt of such notice, the SA Authority will remove the SA Holder from the SA Holders list and consider the SA no longer valid. The SA Holder acknowledges that its withdrawal from the SA Holders list and SA will not affect any Contracts entered into prior to the receipt by the PWGSC SA Authority of such notice.
2. If during the course of the SA the PWGSC SA Authority becomes aware that the SA Holder is in violation of the terms and conditions of this SA or any resulting Contract, Canada may withdraw the SA Holder from the SA Holders list and remove authorization to use the SA, in the manner set-out below or take other appropriate action.
3. Canada may, by giving thirty (30) days written notice to the SA Holder, withdraw the SA Holder from the SA Holders list and remove authorization from the Client department to use the SA. Canada acknowledges that withdrawal of the SA Holder from the SA Holders list and removal of authorization to use the SA will not, through this action alone, affect any Contracts made prior to the issuance of such notice.
4. Conditions which may result in withdrawal of authorization to use the SA include, but are not limited to:

i. Documented history of chronic poor Contract performance.

The PWGSC SA Authority will meet with the SA Holder within thirty (30) days after reported instances of poor service performance. If, after meeting with the SA Holder, the situation is not improved within the next thirty (30) days, the SA Holder may be withdrawn from the SA Holders list and authorization to the authorized client to use the SA will be withdrawn; or,

ii. Documented history of chronic late Contract performance.

The PWGSC SA Authority will meet with the SA Holder within thirty (30) days after reported instances of late Contract performance. If, after meeting with the SA Holder the performance is not improved within the next thirty (30) days, the SA Holder may be withdrawn from the SA Holders list and authorization to the authorized client to use the SA will be withdrawn; or,

iii. Documented history of chronic violation of any of the specific terms and conditions detailed in this SA.

The PWGSC SA Authority will meet with the SA Holder within thirty (30) days after reported instances of any such violation. If, after meeting with the SA Holder, the situation is not improved within thirty (30) days, the SA Holder may be withdrawn from the SA Holders list and authorization to the authorized client to use the SA will be withdrawn;

5. Each reported instance of violation will be investigated by the PWGSC SA Authority to confirm that the SA Holder is indeed in violation of the terms and conditions of the SA, or Contract(s).
6. Withdrawal of authorization to use the SA, for whatever reason, does not remove the right of the PWGSC SA Authority or the authorized client to pursue other measures that may be available.
7. If the "Best Value Supplier" fails to submit a proposal in response to a Mini Request for Proposal (Mini RFP) issued under the Supply Arrangements five (5) times in a row, this will automatically result in the removal of "Best Value Supplier" status from the Supplier. The Supplier will become a regular Supply Arrangement Holder.
8. If the "Best Value Supplier's" Supply Arrangement is withdrawn for any reason, or if "Best Value Supplier" status is removed from the Supplier as in item 7 above, the second-best value supplier will become the "Best Value Supplier".

10. Priority of Documents

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 the Supply Arrangement;
- b) the general conditions 2020 (2010-01-11), General Conditions - Supply Arrangement - Goods or Services;
- c) the supplementary general conditions 4007 (2008-12-12), Canada to Own Intellectual Property Rights in Foreground Information;
- d) Annex "A", Statement of Work;

- e) Annex "B", Basis of Payment;
- f) Annex "C", Security Requirements Check List (if applicable);
- g) Annex "D", Detailed Process for Requests for Proposals Issued Under the Supply Arrangements;
- h) Appendix "1", List of Environmental Attributes (if applicable); and
- i) the Supplier's arrangement dated _____.

11. Certifications

11.1 Compliance

Compliance with the certifications provided by the Supplier in the arrangement is a condition of the Supply Arrangement (SA) and subject to verification by Canada during the term of the SA and of any resulting contract that would continue beyond the period of the SA. If the Supplier does not comply with any certification or it is determined that any certification made by the Supplier in the arrangement is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and suspend or cancel the SA.

11.2 SACC Manual Clauses

SACC Manual clause S1010T (2008-12-12) Education and Experience

SACC Manual clause A3000C (2010-01-11) Aboriginal Business Certification (if applicable)

12. Applicable Laws

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

13. Commercial General Liability Insurance

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

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- e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - g) Employees and, if applicable, Volunteers must be included as Additional Insured.
 - h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
 - j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
 - k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
 - l) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
 - m) Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.
 - n) Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
 - o) All Risks Tenants Legal Liability - to protect the Contractor for liabilities arising out of its occupancy of leased premises.
 - p) Sudden and Accidental Pollution Liability (minimum 120 hours): To protect the Contractor for liabilities arising from damages caused by accidental pollution incidents.
 - q) Litigation Rights: Pursuant to subsection 5(d) of the *Department of Justice Act*, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.
 - r) For the province of Quebec, send to:

Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:

Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

14. Basis for Canada's Ownership of Intellectual Property

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract(s) 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.

B. BID SOLICITATION

1. Bid Solicitation Documents

Canada will use the bid solicitation template 2T-MED1 for medium complexity requirements available in the Manual (<http://sacc.pwgsc.gc.ca/sacc/index-e.jsp>).

The bid solicitation will contain as a minimum the following:

- a) security requirements (*if applicable*);
- b) a complete description of the Work to be performed;
- c) 2003, Standard Instructions - Goods or Services - Competitive Requirements; 2004, Standard Instructions - Goods or Services - Non-competitive Requirements;
- d) bid preparation instructions;
- e) instructions for the submission of bids (address for submission of bids, bid closing date and time);
- f) evaluation procedures and basis of selection;
- g) Certifications;
- h) conditions of the resulting contract; and
- i) the information identified in Annex "D" Detailed Process for Requests for Proposals Issued Under the Supply Arrangements.

2. Bid Solicitation Process

- 2.1 Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from suppliers who have been issued a SA.
- 2.2 The bid solicitation will be sent to Suppliers directly via e-mail.

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- 2.3 The resulting contract (PWGSC-TPSGC 9400-4 Contract) will be awarded by Public Works and Government Services Canada - Communication Procurement Directorate.

C. RESULTING CONTRACT CLAUSES

1. General

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the template used for the bid solicitation.

For any contract to be awarded using the 2T-MED1 (for medium complexity requirements), general conditions 2010B (2010-01-11) - General Conditions - Professional Services (Medium Complexity) will apply.

The above templates are set out in the Standard Acquisition Clauses and Conditions Manual (<http://sacc.pwgsc.gc.ca/sacc/contents-e.jsp>) issued by Public Works and Government Services Canada.

ANNEX "A"

STATEMENT OF WORK

A.1 Overview

The Government of Canada requires the provision of a full range of events management services, including but not limited to meetings, conferences, workshops, summits, consultations, round tables, award ceremonies, galas and opening ceremonies on an "as and when requested basis".

A.2 Tasks

The Contractor will be required to provide event management services on an "as and when requested basis" in support of government programs throughout North America. These services may include, but are not limited to, the following:

A.2.1 General Pre-Event Planning

- Establishing and/or clarifying event objectives and designing program content and formats;
- Working with organizing groups and individuals to determine the purpose, parameters, policies and procedures for events;
- Evaluating the impact of events on the image and success of the client organization holding the events;
- Preparing and/or executing a plan which meets the defined needs and culture of the organization holding events;
- Making or assisting in making key decisions related to event design, objectives and content, negotiations, personnel, financial management, and contingencies; and
- Negotiating sponsorship, partnership and official supplier arrangements.

A.2.2 Specific Pre-Event Planning

- Establishing and coordinating marketing and promotions;
- Recruiting of event participants;
- Establishing and coordinating registration procedures;
- Assisting the client with program and session planning, including formatting, timelines, and Agenda preparation;
- Arranging for the production, printing, and distribution of related material, before, during and after the event;
- Collating and distributing conference kits;
- Preparing name badges;
- Coordinating media relations and media accreditation;
- Handling and planning for sensitive event topics;
- Developing logos, letterheads and signage;
- Securing any additional insurance at the request of the Project Authority;
- Developing floor plans and assigning exhibit space (both paid and unpaid);
- Prospecting and negotiating for services which will be required in order to execute events; and
- Providing advice and managing protocol for dignitaries at the local, national or international level.

A.2.3 Transportation (Ground, Air, Marine)

- Arranging for commercial air transportation including group check-ins and boarding assistance;
- Acquiring ground transportation (coach buses or trains);
- Acquiring rental cars, vans, buses, shuttles or taxis;
- Arranging for transportation of event materials;
- Issuing and delivering transportation tickets to delegates;
- Providing information on security requirements and procedures at commercial airports;
- Facilitating border crossings, including ensuring delegates have the required passports/visas; and
- Coordinating seats, meals, facilities, and related services for transportation.

A.2.4 Accommodations

- Block booking rooms at appropriate hotels;
- Providing information and instructions to delegates on using hotel phones/internet and the cost of other hotel services;
- Providing emergency currency exchange services;
- Providing interpreters as required; and
- Providing final rooming lists to hotels.

A.2.5 Venue and Related Services

- Arranging for the rental of space for the event (including identifying and negotiating with selected sites and facilities authorities);
- Conducting space planning, layouts and staging;
- Selecting and making provisions for facilitators/speakers;
- Arranging for notetakers;
- Arranging for the provision of simultaneous interpretation and/or on-site translation (in English, French, or one or more other languages as requested by the Project Authority);
- Arranging and providing for on-site security during and after hours;
- Coordinating entertainment and family programs;
- Planning and managing audiovisual requirements;
- Provision of venue accoutrements (podiums, decorations, banners, tables, chairs, tents, etc);
- Arranging for rental of cell phones;
- Arranging for a photographer and/or videographer; and
- Arranging and providing for support services such as a Business Service Centre (with fax, printer, monitor, internet capability, etc.) desk top publishing, conference publishers, IT hardware and software, and electronic polling.

A.2.6 On-Site Event Coordination Services

- Maintaining logistical control of events;
- Coordinating registration procedures (both paper-based and automated environments) as well as collecting registration fees;
- Hiring, training, motivating, and leading volunteers;

- Briefing, directing and assisting the Client on-site;
- Managing exhibits and booth setup;
- Managing hospitality, food and beverage; and
- Coordinating speakers / presenters / facilitators, notetakers, simultaneous interpreters and translators, security staff, audio-visual staff, photographer/videographer.

A.2.7 Contractor Travel

- Travelling with or without the client on reconnaissance and advance trips to event locations;
- Travelling to the event location to provide on-site services during the event; and
- Travelling to the client's location for planning meetings and progress briefing sessions.

A.2.8 Financial Management

- Establishing, monitoring and managing the financial objectives of events;
- Following the Treasury Board Hospitality Policy;
- Establishing set amounts for reimbursements to participants using Treasury Board Guidelines;
- Preparing and providing expense reimbursements (according to Treasury Board Guidelines) to participants following the events; and
- Establishing billing procedures, reviewing bills from subcontractors, and ensuring payments for expenses as required.

A.2.9 Risk Management

- Providing a detailed risk management plan during the early planning stages of the event, oversee and modify the plan as necessary during events, and updating the plan as required throughout the duration of the project.

A.2.10 Post-Conference Reporting and Debriefing

- Preparing final report for the event including a final budget.
- Debriefing the Project Authority and other client officials regarding the final outcome(s) of the event, including lessons learned.
- Conduct follow-ups for registration, delegate services (payments, summaries, delegate lists, event proceedings, etc.) via all means (paper, electronic, web).
- Follow up with suppliers for all billing, services, adjustments and final payments, etc.

A.3 Environmental Considerations

Invitations to, registration of, and correspondence with event participants is to be conducted electronically whenever possible.

All non-electronic correspondence and event supplies including reports, documents, invoices, name cards, place cards, banners, registration packages, brochures, handouts, and session notes should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content. 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.

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The Contractor is encouraged to access the PWGSC Travel and Accommodation directory, which includes green rated hotels.

The Contractor is encouraged to use surplus assets and rented signage, at the request of the Project Authority, and whenever possible and reasonable to do so.

A.4 Official Languages

The Contractor's firm may be required to provide services in both official languages (English and French). At a minimum, one (1) of the Contractor's on-site resources must be bilingual if the Work is being performed in a bilingual region.

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ANNEX "B" BASIS OF PAYMENT

All rates are in Canadian dollars, GST/HST extra, FOB destination.

Professional Services

The rates charged for professional services are all-inclusive. They include the cost of labour, fringe benefits, general and administrative expenses, time in transit, overhead, profit and the like, excepting only GST and HST if applicable.

For the purposes of this Supply Arrangement, "time in transit" is defined as the length of time (in 30 minute increments) that is required for the Supply Arrangement Holder to travel from the Supply Arrangement Holder's facilities to the final destination (or vice versa). The means of transportation selected must be in accordance with the Treasury Board Travel Directive. Time in transit (excepting local travel and unless otherwise specifically provided for in the Contract issued under the Supply Arrangements) is subject to verification by and the approval of the Client. Reasonable rest periods will be permitted at the discretion of the Client. Where it is deemed that the Supply Arrangement Holder may charge professional services fees for time in transit, the Supply Arrangement Holder will only be paid for the actual time in transit as defined above, including reasonable rest periods.

The Supply Arrangement Holder is subject to the Applicable Laws as outlined in article 12 of the resulting Supply Arrangements. As such, the Supply Arrangement Holder, is responsible for ensuring adherence to these Laws, including any applicable Labour Laws. The rates charged by the Supply Arrangement Holder reflect this responsibility and Canada will not be subject to additional charges not expressly laid out herein.

Straight Time

Straight time is defined as work performed between the hours of 6:00 a.m. and 10:00 p.m, seven days per week.

Overtime

Overtime is defined as hours outside of the Straight Time hours identified above, including Statutory Holidays. The Supply Arrangement Holder must obtain prior written approval from the Project Authority prior to the performance of any overtime work. Canada is not liable for overtime charges that are not pre-authorized by the Project Authority. Overtime rates will not apply during "time in transit".

Direct Expenses

Direct expenses include any expenses directly incurred by the Supply Arrangement Holder during the performance of the Work or for the purpose of the project, relating to the purchase or rental of materials, equipment, supplies, or other required items. Direct expenses may include, but are not limited to, the following: badges; lanyards; tent cards; flip charts; on-site printing; signage; requirement-specific insurance coverage (at the request of the Project Authority); and any project-specific photocopies, telephone and facsimile charges, parking costs, and mailing, courier, and shipping fees.

All expenses, general and administrative, normally incurred in providing the services (i.e. project office space [including Contractor's hardware and software]; word processing; non-project specific reports, photocopying, courier and telephone charges; local travel and the like) are to be included in the rates for professional services identified herein, and will not be permitted as direct expenses under any resulting contract under the Supply Arrangement.

Direct expenses will be charged at net cost with no allowance for mark-up **unless** multiple payments are not permitted by the Client **or** the Supply Arrangement Holder is expected to "carry" the cost of the direct expense(s) to the end of the Contract Period. In these cases, direct expenses may be charged at net cost with **up to a 10% mark-up** (as per Appendix 2 "Pricing and Evaluation Workbook") to cover carrying charges.

Subcontracting

Subcontracted items include any expenses incurred during the performance of the Work or for the purpose of the project for which a separate contract exists between the Supply Arrangement Holder and the person or firm providing the goods / services. Subcontracted items may include, but are not limited to, the following: the venue, audio/video equipment rental, simultaneous interpretation equipment rental, commercial transportation, hospitality, facilitators, note takers, translation services, travel and living for event participants, on-site printing, signage, etc.

All subcontracted requirements will be provided at net cost with **up to a 10% mark-up** (as per Appendix 2 "Pricing and Evaluation Workbook"). Invoices from the Supply Arrangement Holder to Canada must be accompanied by copies of invoices from the subcontractors. Invoices from second-tier subcontractors (the subcontractors of the Supply Arrangement Holder's subcontractors) are not required under the Supply Arrangement.

For each subcontracted service over \$25,000 (taxes included) the Supply Arrangement Holder will obtain competitive bids from no fewer than three outside suppliers. The Supply Arrangement Holder 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 results.

Travel and Living Expenses

The Supply Arrangement Holder 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 Treasury Board Travel Directive

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(http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/td-dv_e.asp), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

With respect to Modules 2, 3, and 4 of the Directive, meals will be reimbursed based on receipts up to a maximum of the daily allowances specified in Appendix C or D of the Directive, as applicable. If receipts are unavailable, the Supply Arrangement Holder may sign a Declaration in order to receive reimbursement.

Note: The Supply Arrangement Holder is not an employee of Canada and as such, is not eligible for any Government of Canada employee benefits as they pertain to the Treasury Board Travel Directive, or otherwise.

All travel must have the prior written authorization of the Project Authority.

All payments are subject to Government Audit.

Hospitality

All hospitality must have the prior written authorization of the Project Authority and must be included in the Supply Arrangement Holder's quote for the specific requirement. It is the Supply Arrangement Holder's and the Project Authority's combined responsibility to ensure that Hospitality is secured and provided to event participants in accordance with the requirements outlined in the Treasury Board Hospitality Policy. It is the Project Authority's responsibility to adhere to all applicable internal approval procedures as they pertain to Hospitality.

The Treasury Board Hospitality Policy is available at: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12190>.

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ANNEX "C" SECURITY REQUIREMENTS CHECK LIST (SRCL)

See attached.

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ANNEX "D" DETAILED PROCESS FOR REQUESTS FOR PROPOSALS ISSUED UNDER THE SUPPLY ARRANGEMENTS

1. Statement of Work (SOW) - Defining the Requirement (required for directed and competed requirements)

The first step is to determine the requirement and prepare a SOW for a specific work requirement. The information in the SOW should be in sufficient detail to enable the SA Holders to provide accurate estimates of cost/price, required level of effort, other direct costs, schedules for milestones and

deliverables with completion dates and the total price. SOWs for professional services will, to the extent possible, indicate the required resource categories along with the estimated number of hours required for each resource. The SOW should clearly define the specific requirements being procured.

2. Evaluation Criteria (required for competed requirements)

The evaluation criteria will be delineated in the Request for Proposals (RFP). Evaluation criteria will be categorized either as mandatory or as rated evaluation criteria. Associated weighting factors with regard to rated requirements will be identified. Evaluation criteria can be subject to both a mandatory and a point rated evaluation system.

2.1 Mandatory Evaluation Criteria

Mandatory evaluation criteria identify at the outset the minimum requirements for bids to be considered. Mandatory evaluation criteria are evaluated on a simple pass/fail basis. When mandatory evaluation criteria are used, the RFP will clearly indicate that failure to meet any of the mandatory criteria will render the bid non-compliant and that it will be given no further consideration. Mandatory criteria will be expressed by using imperative verbs such as "must" and "will".

Combinations of the following mandatory evaluation criteria only can be used for competed requirements:

Financial Proposal:

The Bidder will be required to provide costing information strictly in accordance with the Basis of Payment as outlined in the Supply Arrangement as well as the Pricing and Evaluation Workbook in the Request for Proposals.

Proposed Resources:

The proposed personnel must be the personnel identified in the Supply Arrangement. No deviations will be permitted, except for those expressly identified in certification 1.4 Status and Availability of Resources.

Language (if required):

One or more of the proposed resources may need to be capable of providing services in both official languages (English or French).

Security:

Bidders must demonstrate that they continue to meet the required security level at the time of bid closing.

2.2 Point Rated Evaluation Criteria

The RFP will clearly state all evaluation factors and their relative importance. Point rated evaluation criteria will be used to establish the minimum requirements (by setting a passing mark) that a bid must meet to be considered a valid and responsive proposal. The evaluation can be set to include an overall pass mark for proposals or pass mark for each individual evaluation criterion, and/or a group of criteria.

Point rated criteria identify those elements that can be evaluated on a variety of characteristics to determine the relative technical merit of each proposal.

Combinations of the following mandatory evaluation criteria only can be used for competed requirements:

Approach and Methodology

The Bidder should provide an approach and methodology outlining the execution of the event described in the Statement of Work.

Bidders should submit a detailed work plan that includes the following:

- a) All of the tasks to be performed. For each individual task, the proposed resource(s) and the level of effort (in hours) to be expended by each resource should be identified; and
- b) Scheduling (timelines), critical points, and key milestones.

Bidders should complete the following table as part of their response to this rated requirement. This table will be verified against the Bidder's response for the 'Total Level of Effort in Hours' column in the Pricing and Evaluation Workbook.

Category of Service	Total Level of Effort for Each Category of Service for the Event
Senior Event Manager	
Event Manager	
Event Coordinator	
Financial Manager	
Event Assistant	
Total	

3. Basis of Selection - Best Value (required for competed requirements)

Lowest cost-per-point. With this selection method, the total proposal price is divided by the corresponding total points achieved by the Bidder for its technical response, to determine each bidder's cost-per-point. The compliant proposal with the lowest cost-per-point will be recommended for the contract.

4. Basis of Payment (required for directed and competed requirements)

A Limitation of Expenditure contract will be used. Multiple invoice payments will be permitted.

5. Steps in the RFP process for competed requirements

The RFP as issued by the PWGSC Contracting Authority will include a Basis of Payment, a bid closing date, a Statement of Work, evaluation criteria and the Basis of Selection.

The RFP will be sent electronically to SA Holders via e-mail as follows: There are two tiers of solicitation processes under the Supply Arrangements - Mini Request for Proposals (Mini RFP) and Request for Proposals (RFP) Under the Supply Arrangements. A Mini RFP is used for requirements valued at more than \$25,000 including applicable taxes but less than \$100,000 excluding applicable taxes. The following Supply Arrangement Holders will be invited to participate in the solicitation process: the "Best Value Supplier", as determined in accordance with the Basis of Selection at article 2 in Part 4; one Supply Arrangement Holder as recommended by the client; and one Supply Arrangement Holder selected at random by PWGSC. An RFP Under the Supply Arrangements is used for requirements valued at more

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than \$100,000 but less than \$400,000 excluding applicable taxes. All Supply Arrangement Holders will be invited to submit a proposal for this solicitation process.

As indicated in the RFP, the SA Holder will be required to submit a proposal within the specified time frame. The time frame will be determined based on the complexity of the requirement.

As requested, the SA Holder will submit a proposal to the PWGSC Contracting Authority by the date and time indicated in the RFP. The Bidder's proposal is not intended to duplicate the SOW, but rather to offer a description of how and when the Bidder proposes to satisfy the requirement, along with the proposed prices for doing so.

Bidders may request written clarification of RFP requirements. Such requests for clarification will be sent to the PWGSC Contracting Authority through electronic means or through written correspondence by the date indicated in the RFP and within the parameters stated in the RFP.

The PWGSC Contracting Authority will answer clarification requests to all bidders. As a result of clarification requests, the PWGSC Contracting Authority will determine if any revisions to SOW requirements or evaluation criteria is required, and if necessary, issue an amendment to the RFP.

6. Steps in the RFP process for directed requirements (this process will only be used in exceptional circumstances and must be justified by a Senior Government Executive)

The RFP as issued by the PWGSC Contracting Authority will include a Basis of Payment (i.e. Limitation of expenditure), a bid closing date and a SOW.

The RFP will be sent electronically to a specific SA Holder via e-mail.

As indicated in the RFP, the SA Holder will be required to submit a proposal within the applicable time frame.

As requested, the SA Holder will submit a proposal to the PWGSC Contracting Authority by the date indicated in the RFP. The Bidder's proposal is not intended to duplicate the SOW, but rather to offer a description of how and when the Bidder proposes to satisfy the requirement, along with the proposed prices for doing so. Price/rate support must be submitted by the SA Holder in conjunction with the proposal. Acceptable price/rate support is one or more of the following:

- current published price list indicating the percentage discount available to the Government; or
- paid invoices or previous contracts for like items (like quality and quantity) sold to other customers; or
- price breakdown showing, if applicable, the cost of direct labour, general and administrative overhead, transportation, profit, etc.

7. Evaluation of Proposals (required for competed requirements)

The proposal will be evaluated consistent with the evaluation factors identified in the RFP.

8. Contract Award (applicable to directed and competed requirements)

Contracts awarded under the SAs will clearly specify the work to be performed for the full period of performance, including option years. The PWGSC Contracting Authority will award Contracts in

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CCC No./N° CCC - FMS No/ N° VME

accordance with Part 6 B. Resulting Contract Clauses of this SA, and incorporate the Statement of Work and the final proposal by reference. The Contract authorizes the SA Holder to proceed based upon the agreed technical requirements, milestone and deliverable schedule, including start and end dates for each milestone or deliverable. The SA Holder will not commence work until an approved Contract has been received from the PWGSC Contracting Authority, at the beginning of the period. The SA Holder acknowledges that any and all work performed in the absence of the aforementioned Contract will be done at the SA Holder's own risk, and Canada will not be liable for payment therefor, unless or until a Contract is provided by the PWGSC Contracting Authority.

9. Debriefs (required for competed requirements)

At contract award, the PWGSC Contracting Authority will notify all bidders as to which SA Holder is being awarded the contract.

If a Bidder has questions as to why their proposal was not selected, the Bidder may direct written or verbal questions to the PWGSC Contracting Authority within a reasonable period of time after contract award. The PWGSC Contracting Authority will debrief the Bidder in writing as to why it was not selected.

The debriefing should be provided within a reasonable period of time after award.

10. Contract Amendments

The estimated total cost authorized for each Contract is not to be exceeded unless and until an increase is authorized by a formal Contract amendment and in accordance with the limits defined herein. No amendment of a Contract will be binding upon the Contractor or Canada unless a formal Contract amendment has been issued by the PWGSC Contracting Authority. Likewise, Canada will not be liable for any adjustment to the price of a Contract on account of a change, unless the change is authorized in writing by the PWGSC Contracting Authority.

=====
ANNEX "E"
EVALUATION GRIDS

See attached.

=====
APPENDIX "1"
LIST OF ENVIRONMENTAL ATTRIBUTES

(To be inserted by the Supply Arrangement Authority prior to Supply Arrangement authorization, if included in the Supplier's response to R.4 Environmental Considerations. Otherwise, this appendix will be deleted.)

=====

APPENDIX "2"
PRICING AND EVALUATION WORKBOOK
(TO BE USED IN CONJUNCTION WITH ANNEX "B")

See attached.

Please contact Paola Amaral, Supply Arrangement Authority at paola.amaral@pwgsc-tpsgc.gc.ca for an electronic copy of this document.

=====

APPENDIX "3"
STATEMENT OF WORK FOR SAMPLE EVENT FOR THE RATED TECHNICAL CRITERIA R.2
(FOR EVALUATION PURPOSES ONLY)

S.1 Background

A federal government department is holding a three-day meeting (Tuesday through Thursday) on a politically sensitive topic. One hundred (100) delegates from across Canada will be in attendance. Anticipated delegates will include high-level parliamentary officials including two Ministers, senior executives from both the federal government department and industry, as well as the general public and members of the media. The meeting will be held in a downtown hotel in the city where the Supplier is located. There will be a panel of 5 high-ranking delegates, including the two Ministers in attendance. PowerPoint presentations by this panel will form part of the agenda.

S.2 Tasks

The Supplier will be required to provide the following event management services in relation to the above event:

S.2.1 General Pre-Event Planning

- Attending three (3) half-day planning meetings with the client (located in the same city where the Supplier is located and where the event is occurring) to determine the purpose, parameters, policies and procedures for the event.

S.2.2 Specific Pre-Event Planning

- Collating and distributing conference kits for the 100 delegates (60 English versions, 40 French versions - 50 pages single-sided black and white each in a folder to be provided by the client). The Client will provide the materials for collation. The kits should be mailed out in advance of the conference;

- Preparation of 100 name badges in plastic sleeves on lanyards. Purchase of lanyards and screen-printing to be coordinated by Supplier;
- Distribution of invitations to delegates by mail. The client will prepare the invitation and conduct all translation;
- Coordinate RSVPs and registration detail prior to the event (no registration fee applies); and
- Developing basic signage for the event (two banners, four posters on easels).

S.2.3 Transportation (Ground and Air)

- Arranging for commercial air transportation for all delegates. Five (5) of these delegates will be from one single remote location in Canada. The other ninety-five (95) delegates will be from five different locations across Canada. Delegates will arrive on Monday and depart on Friday;
- Acquiring three buses, two rental cars, and two cars with drivers for the event;
- Issuing and delivering transportation tickets to delegates;
- Providing information on security requirements and procedures at commercial airports; and
- Coordinating seats, meals, facilities, and related services for transportation.

Note: The Supplier will coordinate the bookings through the Government's official travel agency. The travel charges may be automatically billed to the Client.

S.2.4 Accommodations

- Block booking rooms at an appropriate hotel for one hundred (100) delegates;
- Providing information and instructions to delegates on using hotel phones/internet and the cost of other hotel services; and
- Providing final rooming lists to hotels.

Note: The delegates will be required to pay for their respective rooms and charges and submit these on an expense claim for reimbursement by the Client.

S.2.5 Venue and Related Services

- Arranging for the rental of space for the event. Venue will be in the same city as the Supplier is located. One main room (seating for 100) and four break-out rooms (seating for 20 in each) is required;
- Selecting and making provisions for six (6) facilitators;
- Arranging for six (6) notetakers (two for the main rooms and one for each of the break-out rooms);
- Arranging for the provision of simultaneous interpretation (in English, French, and Inuktitut);
- Arranging and providing for on-site security during and after hours (including two security guards manning each of the two entrances and exits to the venue); and
- Planning and managing audiovisual requirements (two screens, two projectors, microphone, and podium in the main room).

Note: The Supplier will be required to sign the contracts and pay for the venue and related costs, facilitators, note-takers, simultaneous interpretation, and audio-visual requirements. Security services will be provided by the venue.

The facilitators and note-takers will be required for the entire duration of the event. The facilitators are to provide a safe open-forum for discussion and debate. The two facilitators in the main room will provide emcee services. The note-takers are to provide a full transcript of the event as well as a short two-page report covering the major conclusions reached during the meeting. The report and transcript will be required electronically in Microsoft Word format.

S.2.6 On-Site Event Coordination Services

- Maintaining logistical control of the event;
- Coordinating registration procedures (automated);
- Managing hospitality (coffee and snacks in the morning and afternoon, cold lunch); and
- Coordinating facilitator, notetakers, simultaneous interpreters, security staff, and audio-visual staff.

S.2.7 Financial Management

- Establishing set amounts for reimbursements to participants using Treasury Board Guidelines;
- Receive expense claims from delegates following the event and coordinate for reimbursement by the Client;
- Establishing billing procedures, reviewing bills from subcontractors, and ensuring payments for expenses as required.

S.2.8 Post-Conference Reporting and Debriefing

- Preparing final report for the event including a final budget.

Note to suppliers: Assume the contract is awarded three months prior to the event. The client will provide the delegate list one week following contract award.



**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine		Travaux publics et Services gouvernementaux Canada	2. Branch or Directorate / Direction générale ou Direction Acquisitions	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant		
4. Brief Description of Work / Brève description du travail RFSO / RFSa for Events Management Services				
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?				<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?				<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis				
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)				<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.				<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?				<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès				
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>		Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion				
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>		No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information				
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>		
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>		
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>		
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>		
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>		
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>		
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		



PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :
9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui
- Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET- SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMBLEMES | | | |

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET TRÈS SECRET
											A	B	C			
Information / Assets Renseignements / Biens Production	✓															
IT Media / Support TI	✓															
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Contract Number / Numéro du contrat EN578-092644
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Robert Pelot		Title - Titre Manager	Signature <i>Robert Pelot</i>
Telephone No. - N° de téléphone 813-990-6842	Facsimile No. - N° de télécopieur 631-993-2581	E-mail address - Adresse courriel robert.pelot@pwgsc-tpsgc.gc.ca	Date 28-May-09
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) Simone Gauthier		Title - Titre Security Analyst	Signature <i>Simone Gauthier</i>
Telephone No. - N° de téléphone 819-934-0513	Facsimile No. - N° de télécopieur 819-956-4315	E-mail address - Adresse courriel simone.gauthier@tpsgc-pwgsc.gc.ca	Date 2009/05/28
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées) Rochelle York		Title - Titre Supply Specialist	Signature <i>Rochelle York</i>
Telephone No. - N° de téléphone 613-998-8408	Facsimile No. - N° de télécopieur 613-993-2581	E-mail address - Adresse courriel rochette.york@pwgsc-tpsgc.gc.ca	Date 28-May-09
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées) MARIA MENDOZA		Title - Titre Contract Security Officer	Signature <i>Maria Mendoza</i>
Telephone No. - N° de téléphone 613 948-1618	Facsimile No. - N° de télécopieur 613-954-4171	E-mail address - Adresse courriel maria.mendoza@tpsgc-pwgsc.gc.ca	Date May 29, 2009

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

EVALUATION SUMMARY FOR RFSA FOR EVENTS MANAGEMENT SERVICES	
MANDATORY REQUIREMENTS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET	
Mandatories Checked by:	Date:
RATED REQUIREMENTS	SCORE ACHIEVED
R.1 PROPOSED RESOURCES A) Projects B) Proposed Resources	____ / 540 points
R.2 SAMPLE EVENT - APPROACH, METHODOLOGY AND RISK MITIGATION PLAN A) Tasks B) Categories of Expenses C) Scheduling (timelines), Critical Points, and Key Milestones D) Risk Mitigation Plan	____ / 200 points
R.3 EXPERIENCE OF THE FIRM A) Number of Years in Business & Number of Years Specializing in the Provision of Events Management Services B) In-House Capabilities and Niche Market Specializations	____ / 110 points
R.4 ENVIRONMENTAL CONSIDERATIONS	____ / 20 points
OVERALL TOTAL	____ / 870 points
Overall Comments:	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

TECHNICAL (RATED REQUIREMENTS) EVALUATION TEAM SIGNATURES:

_____ Date: _____

NOTE TO EVALUATORS: These evaluation grids contain the basic criteria. These grids must be used in conjunction with the RFSA document to ensure the evaluation is being conducted strictly in accordance with the published criteria.

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

1.1 TECHNICAL EVALUATION

1.1.1 MANDATORY REQUIREMENTS

Evaluation Criteria	Met	Not met
The bid is signed and bid submission requirements of Standard Instructions 2008 are met.		
The security requirements identified in Part 4, article 3 of the solicitation document are met.		
The certifications in Part 5 have been completed and signed (either upon or following bid submission).		
Comments:		

Evaluation Criteria	Met	Not met
M.1 FINANCIAL PROPOSAL		
The Supplier must provide costing information strictly in accordance with the Basis of Payment stipulated in Annex "B" and Appendix "2".		
Comments:		

Evaluation Criteria	Met	Not met
M.2 PROPOSED RESOURCES		
<u>Senior Event Manager:</u>		
<input type="checkbox"/> One (1) but no more than three (3) individuals has been identified. <input type="checkbox"/> All individuals proposed are employees of the Supplier. <input type="checkbox"/> Resources proposed for more than one category of personnel meet all of the criteria for each category and the rates proposed in Appendix "2" for all categories for that resource are identical. <input type="checkbox"/> The Senior Event Manager: <ul style="list-style-type: none"> <input type="checkbox"/> has at least three (3) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates); <input type="checkbox"/> has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable); 		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

<ul style="list-style-type: none"> <input type="checkbox"/> has managed events with delegates from either: more than one province or territory; or more than one country; or both; <input type="checkbox"/> has managed events that require one or more of the firm's personnel to be on-site for three (3) days or more; <input type="checkbox"/> has managed events with a minimum of one hundred (100) delegates; and <input type="checkbox"/> has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications. 		
<p><u>Event Manager:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> One (1) but no more than three (3) individuals has been identified. <input type="checkbox"/> All individuals proposed are employees of the Supplier. <input type="checkbox"/> Resources proposed for more than one category of personnel meet all of the criteria for each category and the rates proposed in Appendix "2" for all categories for that resource are identical. <input type="checkbox"/> The Event Manager: <ul style="list-style-type: none"> <input type="checkbox"/> has at least two (2) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates); <input type="checkbox"/> has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable); <input type="checkbox"/> has managed events with delegates from either: more than one province or territory; or more than one country; or both; <input type="checkbox"/> has managed events that require one or more of the firm's personnel to be on-site for three (3) days or more; <input type="checkbox"/> has managed events with a minimum of one hundred (100) delegates; and <input type="checkbox"/> has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications. 		
<p><u>Event Coordinator:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> One (1) but no more than three (3) individuals has been identified. <input type="checkbox"/> All individuals proposed are employees of the Supplier. <input type="checkbox"/> Resources proposed for more than one category of personnel meet all of the criteria for each category and the rates proposed in Appendix "2" for all categories for that resource are identical. <input type="checkbox"/> The Event Coordinator: <ul style="list-style-type: none"> <input type="checkbox"/> has at least one (1) year of experience in coordinating the execution of events; <input type="checkbox"/> has coordinated events where their firm's assigned portion of the overall budget was at least \$100,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable); <input type="checkbox"/> has coordinated events with delegates from either: more than one province or territory; or more than one country; or both; <input type="checkbox"/> has coordinated events that require one or more of the firm's personnel to be on-site for two (2) days or more; <input type="checkbox"/> has coordinated events with a minimum of fifty (50) delegates; and 		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

<input type="checkbox"/> has coordinated the provision of two (2) or more of the following: accommodations, hospitality, transportation, registration and printing or publications.		
Financial Manager: <input type="checkbox"/> One (1) but no more than three (3) individuals has been identified. <input type="checkbox"/> All individuals proposed are employees of the Supplier. <input type="checkbox"/> Resources proposed for more than one category of personnel meet all of the criteria for each category and the rates proposed in Appendix "2" for all categories for that resource are identical. <input type="checkbox"/> The Financial Manager: <input type="checkbox"/> has at least three (3) years of experience providing financial management in Special Events, Hospitality Management, Hotel Management or Tourism fields for projects where the firm was responsible for the receipt, management and disbursement of funds received from the client, from delegate registration revenues, and from any other source for projects with a total cost of \$100,000 or more.		
Event Assistant: <input type="checkbox"/> One (1) but no more than three (3) individuals has been identified. <input type="checkbox"/> All individuals proposed are employees of the Supplier. <input type="checkbox"/> Resources proposed for more than one category of personnel meet all of the criteria for each category and the rates proposed in Appendix "2" for all categories for that resource are identical. <input type="checkbox"/> The Event Assistant: <input type="checkbox"/> has at least six (6) months of experience in assisting with the coordination and execution of events: <input type="checkbox"/> has assisted in the coordination of events where their firm's assigned portion of the overall budget was at least \$50,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable); <input type="checkbox"/> has assisted in the coordination of events with delegates from either: more than one province or territory; or more than one country; or both; <input type="checkbox"/> has assisted in the coordination of events that require one or more of the firm's personnel to be on-site for two (2) days or more; <input type="checkbox"/> has assisted in the coordination of events with a minimum of fifty (50) delegates; and <input type="checkbox"/> has assisted in the provision of one (1) or more of the following: accommodations, hospitality, transportation, registration and printing or publications.		
Comments:		

Evaluation Criteria	Met	Not met
M.3 EVENTS MANAGEMENT PROJECTS		
<input type="checkbox"/> The Supplier must provide five (5) events management projects, where the event dates were after January 1, 2004.		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

<input type="checkbox"/> Each of the Senior Event Managers, Event Managers, Event Coordinators, Financial Managers and Event Assistants identified in M.2 must have been involved in the planning of at least one (1) event. <input type="checkbox"/> An event may be used to demonstrate the experience of more than one resource, however no more than five (5) projects are to be submitted. <input type="checkbox"/> At a minimum, three (3) of the five (5) projects must demonstrate an ability of the Supplier to provide event planning services where the profile of participants is varied. "Participant" is defined as including, but not restricted to, a potential audience, actual delegate, speaker/presenter, moderator, session chair, or member of a client group. "Varied" is defined as including three or more of the following profiles - general public, senior citizens, youth, senior executives, parliamentary officials, VIPs, Veterans, etc. - within one event.		
The Supplier must provide the following information: <input type="checkbox"/> Name of the project/event; <input type="checkbox"/> Duration of the event, including start and end dates; <input type="checkbox"/> Proposed resource(s) to be evaluated; and <input type="checkbox"/> Profile of participants (as defined above) at the event.		
Comments:		

Evaluation Criteria	Met	Not met
M.4 LANGUAGE		
The Supplier must confirm that its firm is capable of providing services in both official languages (English and French). As such, the Supplier must include a duly signed and dated copy of the Certification in the Technical Proposal portion of the Arrangement submission.		
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

1.1.2 RATED TECHNICAL CRITERIA

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. To be deemed responsive, suppliers must comply with all of the requirements of the Request for Supply Arrangements (RFSA); and meet all mandatory technical evaluation criteria; and obtain the required minimum of 50 percent for R.1 and 70 percent for R.2. The rating is performed on a scale of 870 points.

All fully responsive suppliers and all fully responsive Aboriginal suppliers will be recommended for Supply Arrangement authorization. A separate list will be created for Aboriginal suppliers.

The following criteria will be evaluated:

- ✓ Experience of Proposed Resources;
- ✓ Sample Event - Approach, Methodology, and Risk Mitigation Plan;
- ✓ Experience of the Firm; and
- ✓ Environmental Considerations.

INSTRUCTIONS TO EVALUATORS

PLEASE READ THE FOLLOWING CAREFULLY AND IN ITS ENTIRETY PRIOR TO COMMENCING THE EVALUATION OF THE RATED REQUIREMENTS.

- 1) The following scoring grid will be used for the evaluation of R.1 B i) and R.2. All other criteria will be evaluated according to the points specified in the "Assessment of Criteria" column of the sub-requirement box.
- 2) ONLY the Percentage Factors indicated in the table that follows are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available Percentage Factors: 1, 0.9, 0.8, 0.7, 0.5, and 0. Factors such as 0.65, 0.85, etc. MUST NOT be used.
- 3) The "Points" and "Total Points" boxes in the grids will be calculated based on the Percentage Factor(s) assigned. Evaluators MUST NOT select a number for "Points" which does not correspond to a Percentage Factor. For example, 3/10 is not an acceptable score as 0.3 is not an available Percentage Factor from the table that follows.

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

Weighting Levels & Weighting Factors for R.1 B i) and R.2

Percentage Factor	Description of Level	Rating Level
1	Full Points	Full Points <ul style="list-style-type: none"> • All elements present • All elements fully described • Substantial details provided lead to a complete and thorough understanding of the elements
0.9	Very good	Very good response <ul style="list-style-type: none"> • All elements present • All elements well described • Substantial details provided lead to a very good understanding of the elements
0.8	Good	Good response <ul style="list-style-type: none"> • Most elements present • Most elements very well described • Details provided lead to a good understanding of the elements
0.7	Acceptable	Acceptable response <ul style="list-style-type: none"> • Most elements are present • Most elements are described • Details provided lead to a minimum understanding of the elements
0.5	Unacceptable	Un-acceptable response <ul style="list-style-type: none"> • Few elements present • Not all elements are described or are poorly described
0	Nothing	Information required was not provided

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

R.1 Experience of Proposed Resources

Maximum possible points: 540 points

Minimum acceptable points: 270

Please refer to the scoring grid at page 8

The resources proposed in accordance with M.2 will be evaluated on their experience as demonstrated in the events management projects provided in accordance with M.3.

The Supplier should provide the curriculum vitae of each proposed resource outlining their qualifications, training, education, language capability, related work experience and expertise in planning and organizing events and which demonstrates their capability to provide event management services as described in the Statement of Work at Annex "A". The Curriculum Vitae of each proposed resource should substantiate the information provided in this rated requirement. Proof of professional designations, provincial licences, memberships, or course participation should be provided.

The Supplier should also provide the following information for each of the five (5) events identified in M.3:

- Description of the project;
- Dollar value, and initial budget;
- Number of attendees at the event;
- Detailed description of the work performed by each proposed resource to be evaluated; and
- A letter of reference from the client department/commission/agency/firm for the project.

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

A) Project Scope

Maximum possible points: 100

Maximum points per project sample: 20

Project Scope (Maximum 100 Points)						
Assessment of Criteria	Project 1	Project 2	Project 3	Project 4	Project 5	Total Points
<p>Project is similar in scope to the Statement of Work at Annex "A". "Similar in scope" is defined as having a dollar value which is more than \$25,000.00, duration is more than two (2) days, and more than 50 delegates in attendance.</p> <p>Points are to be allocated as follows:</p> <ul style="list-style-type: none"> • None of the above criteria met - 0 points; • Only one (1) of the above criteria met (even if exceeded) - 10 points; • Two (2) of the three (3) criteria met, up to \$100,000.00, three (3) days, and 100 delegates in attendance - 14 points; • Two (2) of the three (3) criteria met, with any one (1) criteria exceeding the \$100,000.00, three (3) days, or 100 delegates - 16 points; • All three (3) of the criteria met, up to \$100,000.00, three (3) days, and 100 delegates in attendance - 18 points; • All three (3) of the criteria met, with any one (1) criteria exceeding the \$100,000.00, three (3) days, or 100 delegates - 20 points. <p>Partial points will not be awarded. Points are not cumulative for one project or among multiple projects.</p>	Points					/100
	/20	/20	/20	/20	/20	
Comments:						

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

B) Proposed Resources

Maximum possible points: 440

i) Experience of Proposed Resources - as demonstrated through the projects:

Maximum points for the Senior Event Manager(s): 50 (average of all resources in the category)

Maximum points for the Event Manager(s): 40 (average of all resources in the category)

Maximum points for the Event Coordinator(s): 30 (average of all resources in the category)

Maximum points for the Financial Manager(s): 30 (average of all resources in the category)

Maximum points for the Event Assistant(s): 20 (average of all resources in the category)

Maximum total points for i): 170

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

Experience of Proposed Resources - as demonstrated through the projects (Maximum 170 Points)							
Assessment of Criteria	Senior Event Manager	Event Manager	Event Coordinator	Financial Manager	Event Assistant	Total Points	
<p>Criteria for an established minimum acceptable response (percentage factor of 0.7):</p> <p>As demonstrated through the projects only:</p> <p><u>Senior Event Manager</u> - demonstration of leadership, problem solving, communication and organization skills.</p> <p><u>Event Manager</u> - demonstration of leadership, problem solving, communication and organization skills.</p> <p><u>Event Coordinator</u> - demonstration of communication and organization skills.</p> <p><u>Financial Manager</u> - demonstration of financial management and organization skills.</p> <p><u>Event Assistant</u> - demonstration of communication and organization skills.</p> <p>Note: If multiple resources are proposed within a single category, the points for each resource within the category will be averaged to obtain a final score for this sub-criteria.</p>	Percentage Factor					/170	
	Points						
	/50	/40	/30	/30	/20		
Comments:							

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

ii) Experience of Proposed Resources - in years:

Maximum points for the Senior Event Manager(s): 25 overall

Maximum points for the Event Manager(s): 25 overall

Maximum points for the Event Coordinator(s): 15 overall

Maximum points for the Financial Manager(s): 15 overall

Maximum points for the Event Assistant(s): 10 overall

Maximum total points for ii): 90

Experience of Proposed Resources - in years (Maximum 90 Points)						
Assessment of Criteria	Senior Event Manager	Event Manager	Event Coordinator	Financial Manager	Event Assistant	Total Points

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

<p>Senior Event Manager(s) / Event Manager(s):</p> <ul style="list-style-type: none"> • Stated minimum up to an additional two (2) years - 5 points; • Between three (3) and five (5) additional years of experience - 10 points; • Between six (6) and ten (10) additional years of experience - 15 points • Between eleven (11) and fifteen (15) additional years of experience - 20 points; • Sixteen (16) or more additional years of experience - 25 points. 	Points					/90
<p>Financial Manager(s) / Event Coordinator(s):</p> <ul style="list-style-type: none"> • Stated minimum up to an additional two (2) years - 5 points; • Between three (3) and five (5) additional years of experience - 10 points; • Six (6) or more additional years of experience - 15 points. 	/25	/25	/15	/15	/10	
<p>Event Assistant(s):</p> <ul style="list-style-type: none"> • Stated minimum up to an additional two (2) years - 5 points; • Three (3) or more additional years of experience - 10 points. 						

Comments:

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

iii) Professional Designations:

Maximum points per category of personnel: 15

Maximum total points for iii): 30

Professional Designations (Maximum 30 Points)						
Assessment of Criteria	Senior Event Manager	Event Manager	Event Coordinator	Financial Manager	Event Assistant	Total Points
Possession by a proposed resource of a valid Certified Meeting Manager (CMM) or Certified Meeting Professional (CMP) designation (15 points per resource possessing either of the designations, maximum 15 points per category of personnel. No points will be awarded if a resource is not in possession of a valid designation. No additional points will be awarded if a resource is in possession of both designations. Partial points will not be awarded.). Note: Points from only two of the categories of personnel will count towards the total points.	Points					/30
	/15	/15	/15	/15	/15	

Comments:

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

iv) Education:

Maximum points per category of personnel: 20

Maximum points per resource (for having taken or taught a minimum of two (2) different courses or seminars related to event planning within the past five (5) years): 10 (maximum 50 points total)

Maximum total points for iv): 150

Education (Maximum 150 Points)						
Assessment of Criteria	Senior Event Manager	Event Manager	Event Coordinator	Financial Manager	Event Assistant	Total Points
Possession by a proposed resource of the following: <ul style="list-style-type: none"> a university degree or college diploma in a related discipline (e.g. Hospitality Management, Hotel management, Tourism, etc.) (20 points); or a university degree or college diploma in an unrelated discipline (10 points); or a high-school diploma <u>with</u> demonstration of attendance at a minimum of two (2) courses or seminars related to event planning within the past five (5) years (5 points). Note: Points are not cumulative for a particular resource or among multiple resources.	Points					/100
	/20	/20	/20	/20	/20	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

Assessment of Criteria	Resource 1	Resource 2	Resource 3	Resource 4	Resource 5	Total Points
<p>An additional ten (10) points will be awarded for any resource having taken or taught a minimum of two (2) different courses or seminars related to event planning or event management within the past five (5) years. Points are not cumulative for a particular resource or among multiple resources. A maximum of fifty (50) points total for teaching of or attendance at courses or seminars will be awarded.</p>	<p>Points</p>					<p>/50</p>
	<p>/10</p>	<p>/10</p>	<p>/10</p>	<p>/10</p>	<p>/10</p>	
Comments:						

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

SUMMARY OF R.1

Maximum possible points: 540

Points Breakdown	
Criteria	Total Points
A) Projects	/100
i) Project Scope	/100
B) Proposed Resources	/440
i) Experience of Proposed Resources - as demonstrated through the projects:	/170
ii) Experience of Proposed Resources - in years:	/90
iii) Professional Designations	/30
iv) Education	/150
TOTAL	/540
Comments:	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

R.2 Sample Event - Approach, Methodology, and Risk Mitigation Plan

Maximum possible points: 200 points

Minimum acceptable points: 140 points

Please refer to the scoring grid at page 8

The Supplier should provide an approach, methodology, and risk mitigation plan outlining the execution of the sample event described in Appendix "3".

The Supplier should submit a detailed work plan that includes the following:

- a) All of the tasks to be performed. For each individual task, the proposed resource(s) and the level of effort (in hours) to be expended by each resource should be identified (maximum 80 points);
- b) All anticipated expenses (by expense name only, no dollar amounts are to be included), categorized as follows - 'Direct Expenses', 'Subcontracting', 'Travel and Living (Supplier)' as per the definitions in Annex "B" (maximum 40 points). See example below.;
- c) Scheduling (timelines), critical points, and key milestones (maximum 40 points); and
- d) Risk mitigation plan (possible problems or risks associated with the sample event, and the proposed plan to prevent these problems or risks from occurring) (maximum 40 points).

Example for b):

<i>Direct Expenses</i>	<i>Subcontracting</i>	<i>Travel and Living (Supplier)</i>
<i>Badges and lanyards</i>	<i>Hospitality</i>	<i>Flights</i>
<i>Participant packages</i>	<i>Simultaneous Interpretation</i>	<i>Meals</i>
<i>etc.</i>	<i>etc.</i>	<i>etc.</i>

The Supplier should complete the following table as part of their response to this rated requirement. This table will be verified against the Supplier's response for the 'Total Level of Effort in Hours for the Sample Event' column in Appendix 2 - Pricing and Evaluation Workbook.

Category of Service	Total Level of Effort for All Proposed Resources Within Each Category of Service for the Sample Event
Senior Event Manager	
Event Manager	
Event Coordinator	
Financial Manager	
Event Assistant	
Total	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

A) Tasks

Maximum possible points: 80

Tasks (Maximum 80 Points)		
Assessment of Criteria	Tasks	Total Points
<p>Criteria for an established minimum acceptable response (percentage factor of 0.70):</p> <p>Most of the tasks to be performed (with the proposed resource - Senior Event Manager, Event Manager, Event Coordinator, Financial Manager, and Event Assistant and level of effort in hours indicated for most tasks) have been provided and are clear.</p>	Percentage Factor	/80
	Points	
	/80	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

B) Categories of Expenses

Maximum possible points: 40

Categories of Expenses (Maximum 40 Points)		
Assessment of Criteria	Categories of Expenses	Total Points
<p>Criteria for an established minimum acceptable response (percentage factor of 0.70):</p> <p>Most expenses, which can be reasonably anticipated given the sample event at Appendix "3", have been identified.</p> <p>Most expenses are divided into the appropriate categories as follows: 'Direct Expenses', 'Subcontracting', 'Travel and Living (Suppliers)'.</p>	<p>Percentage Factor</p>	<p>/40</p>
	<p>Points</p>	
	<p>/40</p>	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

C) Scheduling (timelines), Critical Points, and Key Milestones

Maximum possible points: 40

Scheduling (timelines), Critical Points, and Key Milestones (Maximum 40 Points)		
Assessment of Criteria	Scheduling (timelines), Critical Points, and Key Milestones	Total Points
<p>Criteria for an established minimum acceptable response (percentage factor of 0.70):</p> <p>A schedule with timelines has been provided and is clear and detailed.</p> <p>Most critical points and key milestones have been identified.</p>	Percentage Factor	/40
	Points	
	/40	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

D) Risk Mitigation Plan

Maximum possible points: 40

Risk Mitigation Plan (Maximum 40 Points)		
Assessment of Criteria	Risk Mitigation Plan	Total Points
<p>Criteria for an established minimum acceptable response (percentage factor of 0.70):</p> <p>A risk mitigation plan (possible problems or risks associated with the sample event, and the proposed plan to prevent these problems or risks from occurring) has been provided and is clear and detailed.</p>	Percentage Factor	/40
	Points	
	/40	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

SUMMARY OF R.2

Maximum possible points: 200

Minimum acceptable points: 140

Points Breakdown	
Criteria	Total Points
A) Tasks	/80
B) Categories of Expenses	/40
C) Scheduling (timelines), Critical Points, and Key Milestones	/40
D) Risk Mitigation Plan	/40
TOTAL	/200
Comments:	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

R.3 Experience of the Firm

Maximum possible points: 110

The Supplier should provide the following information as it pertains to the firm:

- a) Number of years in business, including number of years specializing in the provision of events management services (5 points for every 5 years in business to a maximum of 30 points and 5 points for every 5 years in business specializing in events management services to a maximum of 30 points. Partial points will not be awarded.);
- b) In-house capabilities and niche market specializations as they pertain to events management services (Certified Management Accountants, Certified General Accountants, Certified Financial Accountants, IT software programmers, sponsorship and exhibit sales executives, risk management specialists, graphic designers, publications managers, etc) (10 points for every niche market specialization identified with supporting information, to a maximum of 50 points. Partial points will not be awarded.).

The Supplier should also provide the URL address of any Internet site(s) maintained by the Supplier which is/are accessible by Federal Government Departments, Commissions, and Agencies and which will provide information on the services available under a Supply Arrangement and the Supplier's qualifications to provide these services. No points will be awarded for provision of any URL addresses.

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

A) Number of Years in Business & Number of Years Specializing in the Provision of Events Management Services

Maximum possible points: 60

Number of Years in Business & Number of Years Specializing in the Provision of Events Management Services (Maximum 60 Points)		
Assessment of Criteria	Number of Years in Business & Number of Years Specializing in the Provision of Events Management Services	Total Points
5 points for every 5 full years in business.	Points	/60
Partial points will not be awarded.	/30	
5 points for every 5 full years in business specializing in events management services.	Points	
Partial points will not be awarded.	/30	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

B) In-House Capabilities and Niche Market Specializations

Maximum possible points: 50

In-House Capabilities and Niche Market Specializations (Maximum 50 Points)		
Assessment of Criteria	In-House Capabilities and Niche Market Specializations	Total Points
<p>10 points for every niche market specialization (Certified Management Accountants, Certified General Accountants, Certified Financial Accountants, IT software programmers, sponsorship and exhibit sales executives, risk management specialists, graphic designers, publications managers, etc) identified with supporting information.</p> <p>Partial points will not be awarded.</p> <p>No points will be awarded for provision of the URL address(es) for any Internet site(s).</p>	Points	/50
	/50	
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

SUMMARY OF R.3

Maximum possible points: 110 points

Points Breakdown	
Criteria	Total Points
A) Number of Years in Business & Number of Years Specializing in the Provision of Events Management Services	/60
B) In-House Capabilities and Niche Market Specializations	/50
TOTAL	/110
Comments:	

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

R.4 Environmental Considerations

Maximum possible points: 20 points

The Supplier should provide the following:

- An existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations);
- An existing or proposed proposed action plan for energy sourcing (measures taken to improve energy efficiency, intended use of alternative fuel/power sources if the Supplier's premises is owned); and
- An existing or proposed proposed action plan for materials/equipment sourcing (intended use of recycled or reused products, waste management strategy); and
- An existing or proposed action plan for transportation logistics (minimization of travel, use of green hotels).

Provision of each of the above is worth five (5) points. Partial points will not be awarded.

The Supplier should also provide a listing of environmental attributes for its firm. This will not be evaluated but will form part of any resulting Supply Arrangement.

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

Environmental Considerations (Maximum 20 Points)		
Assessment of Criteria	Environmental Considerations	Total Points
<p>5 points each for identification of:</p> <ul style="list-style-type: none"> An existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); An existing or proposed proposed action plan for energy sourcing (measures taken to improve energy efficiency, intended use of alternative fuel/power sources if the Supplier's premises is owned); and An existing or proposed proposed action plan for materials/equipment sourcing (intended use of recycled or reused products, waste management strategy); and An existing or proposed action plan for transportation logistics (minimization of travel, use of green hotels). <p>Partial points will not be awarded.</p> <p>No points are awarded for provision of the listing of environmental attributes.</p>	<p style="font-size: 24px; margin: 0;">Points</p>	<p style="font-size: 24px; margin: 0;">/20</p>
Comments:		

EVALUATION GRID for RFSA for Events Management Services

Supplier:

Evaluator's Initials:

2. Basis of Selection - Supply Arrangements

1. To be declared responsive, an arrangement must:
 - a) comply with all the requirements of the Request for Supply Arrangements (RFSA); and
 - b) meet all mandatory technical evaluation criteria; and
 - c) obtain the required minimum of 50 percent for R.1 and 70 percent for R.2. There is no required minimum for R.3 or R.4. The rating is performed on a scale of 870 points.
2. Arrangements not meeting (a) or (b) or (c) above will be declared non-responsive.
3. All fully responsive suppliers and all fully responsive Aboriginal suppliers will be recommended for Supply Arrangement authorization. A separate list will be created for Aboriginal suppliers under the Set-Aside Program for Aboriginal Business.

4. "Best Value Supplier" Determination:

The current "Best Value Supplier" will continue to be the Best Value Supplier for the entire duration of the Supply Arrangements, unless the Best Value Supplier's arrangement is withdrawn or unless "Best Value Supplier" status is removed from the Supplier. This Supply Arrangement refresh does not affect the "Best Value Supplier's" status.

3. Security Requirement

1. Before issuance of a supply arrangement, the following conditions must be met:
 - (a) the Supplier must hold a valid organization security clearance as indicated in Part 6A - Supply Arrangement;
 - (b) the Supplier's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 6A - Supply Arrangement;
 - (c) the Supplier must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
2. For additional information on security requirements, suppliers should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" document on the Departmental Standard Procurement Documents Web site.

NOTE: The Supply Arrangements will be authorized once the evaluation is complete and this will not be delayed to allow Suppliers to secure the required security clearance. It is the Supplier's responsibility to follow up with CISD to ensure that their clearance is in place.

**FOR REQUESTS FOR PROPOSALS ISSUED UNDER THE SUPPLY ARRANGEMENTS:
SAMPLE GRIDS FOR RATED TECHNICAL CRITERIA**

Bidder:

Evaluator's Initials:

Note to Bidders: These evaluation grids will be used for any resulting RFP and are provided here for reference only.

Approach and Methodology

The Bidder should provide an approach and methodology outlining the execution of the event described in the Statement of Work.

The Bidder should submit a detailed work plan that includes the following:

- a) All of the tasks to be performed. For each individual task, the proposed resource(s) and the level of effort (in hours) to be expended by each resource should be identified; and
- b) Scheduling (timelines), critical points, and key milestones.

The Bidder should complete the following table as part of their response to this rated requirement. This table will be verified against the Bidder's response for the 'Total Level of Effort in Hours' column in the Pricing and Evaluation Workbook.

Category of Service	Total Level of Effort for Each Category of Service for the Event
Senior Event Manager	
Event Manager	
Event Coordinator	
Financial Manager	
Event Assistant	
Total	

**FOR REQUESTS FOR PROPOSALS ISSUED UNDER THE SUPPLY ARRANGEMENTS:
SAMPLE GRIDS FOR RATED TECHNICAL CRITERIA**

Bidder:

Evaluator's Initials:

A) Tasks

Maximum possible points: 70

Tasks (Maximum 70 Points)		
Assessment of Criteria	Tasks	Total Points
Criteria for an established minimum acceptable response (percentage factor of 0.70): Most of the tasks to be performed (with the proposed resource - Senior Event Manager, Event Manager, Event Coordinator, Financial Manager, and Event Assistant and level of effort in hours indicated for most tasks) have been provided and are clear.	Percentage Factor	/70
	Points	
	/70	
Comments:		

**FOR REQUESTS FOR PROPOSALS ISSUED UNDER THE SUPPLY ARRANGEMENTS:
SAMPLE GRIDS FOR RATED TECHNICAL CRITERIA**

Bidder:

Evaluator's Initials:

B) Scheduling (timelines), Critical Points, and Key Milestones

Maximum possible points: 30

Scheduling (timelines), Critical Points, and Key Milestones (Maximum 30 Points)		
Assessment of Criteria	Scheduling (timelines), Critical Points, and Key Milestones	Total Points
Criteria for an established minimum acceptable response (percentage factor of 0.70): A schedule with timelines has been provided and is clear and detailed. Most critical points and key milestones have been identified.	Percentage Factor	/30
	Points	
	/30	

Comments:

**FOR REQUESTS FOR PROPOSALS ISSUED UNDER THE SUPPLY ARRANGEMENTS:
SAMPLE GRIDS FOR RATED TECHNICAL CRITERIA**

Bidder:

Evaluator's Initials:

SUMMARY

Maximum possible points: 100
Minimum acceptable points: 70

Points Breakdown	
Criteria	Total Points
A) Tasks	/70
B) Scheduling (timelines), Critical Points, and Key Milestones	/30
TOTAL	/100

Comments:



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Appendix 2 - Pricing and Evaluation Workbook

PWGSC/CPD

Request for Supply Arrangements (RFSA) - REFRESH 2012

EVENTS MANAGEMENT SERVICES

RFSA # EN578-092644/D - ATTACHMENT V.1

Colour Key	
	To be filled in by the Supplier
	Contains coding for automatic calculations
	Totals used for evaluation purposes
	Titles

Canada

Please read the following instructions carefully

It is **MANDATORY** that all items be quoted and all blank spaces with a background coloured the same as this cell be completed by the Supplier. Suppliers are encouraged to double check all calculations as their final status as a supplier will be determined as a direct result of these spreadsheets.

The following spreadsheet will be used to evaluate each arrangement received. The prices and rates that must be quoted will apply to any resulting contract under a Supply Arrangement. The level of effort (number of hours) must be based exactly on the sample event described in Appendix "3". The total price that will be used as the Supplier's Bid Evaluation Price (BEV) is considered all-inclusive to conduct the sample event for evaluation purposes only. There are to be no options for the purpose of the BEV. **Any supplier that includes any conditions whatsoever will be deemed non-responsive.**

Unit Pricing Tab

Column

Hourly Rate (Cells B8 to B16)
 Mark-up for Direct and Subcontracted Expenses (Cell B18)

Instructions

Suppliers MUST specify their proposed hourly rate
 Suppliers MUST indicate their Mark-up for Direct and Subcontracted Expenses as a percentage

BEV Calculation Tab

Level of Effort (Column B)

Suppliers MUST insert the Level of Effort in hours from their response to the Rated Requirement R.2

Bid Evaluation Value (BEV)

The BEV is the total that will be used for evaluation purposes.

EVENTS MANAGEMENT SERVICES

The following pricing will apply to the Supply Arrangement as indicated. Suppliers must complete all cells with beige background. All rates are to be straight time rates (work performed between the hours of 6:00 a.m. and 10:00 p.m., seven days per week).

Category of Service	Hourly Rate applicable from August 1, 2012 to July 31, 2013
Senior Event Manager	\$0.00
Event Manager	\$0.00
Financial Manager	\$0.00
Event Coordinator	\$0.00
Event Assistant	\$0.00
Direct and Subcontracted Expenses Mark-up	0.00%

Overtime: defined as hours outside of the Straight Time hours identified above. The Supplier must obtain prior approval from the Project Authority prior to the performance of any overtime work. Canada is not liable for overtime charges that are not pre-authorized by the Project Authority. Overtime percentage increases must be within industry standards.

The above rates will be increased by the following percentage should overtime work be required/authorized **0.00%**

EVENTS MANAGEMENT SERVICES

The following pricing calculations are for evaluation purposes only and are based on the unit prices from the unit pricing spreadsheet as quoted by the Supplier. The only cells to be completed by the Supplier in this spreadsheet are the cells found in the "Total Level of Effort in Hours for the Sample Event" column, which must contain the total level of effort in hours for each category for the sample event detailed in Appendix "3". The Direct and Subcontracted Expense calculation is based on \$50K

Description	Total Level of Effort in Hours for the Sample Event	Hourly Rate (Second Option Year)	Direct and Subcontracted Expenses Markup	Totals for BEV
Senior Event Manager	0	\$0.00		
Totals for evaluation:		\$0.00		\$0.00
Description	Total Level of Effort in Hours for the Sample Event	Hourly Rate (Second Option Year)	Direct and Subcontracted Expenses Markup	Totals for BEV
Event Manager	0	\$0.00		
Totals for evaluation:		\$0.00		\$0.00
Description	Total Level of Effort in Hours for the Sample Event	Hourly Rate (Second Option Year)	Direct and Subcontracted Expenses Markup	Totals for BEV
Financial Manager	0	\$0.00		
Totals for evaluation:		\$0.00		\$0.00
Description	Total Level of Effort in Hours for the Sample Event	Hourly Rate (Second Option Year)	Direct and Subcontracted Expenses Markup	Totals for BEV
Event Coordinator	0	\$0.00		
Totals for evaluation:		\$0.00		\$0.00

Description	Total Level of Effort in Hours for the Sample Event	Hourly Rate (Second Option Year)	Direct and Subcontracted Expenses Mark-up	Totals for BEV
Event Assistant	0	\$0.00	0%	
Totals for evaluation:		\$0.00	\$0.00	\$0.00
Total Bid Evaluation Value (BEV) for evaluation purposes				\$0.00

Cost per Point Calculation

BEV Based on Unit Rates and Direct and Subcontracted Expense Mark-up				
<i>Supplier</i>	<i>BEV</i>	<i>Points Achieved</i>	<i>Cost per Point</i>	<i>Comments</i>
Firm # 1	\$0.00	1	\$0.00	
Firm # 2	\$0.00	1	\$0.00	
Firm # 3	\$0.00	1	\$0.00	
Firm # 4	\$0.00	1	\$0.00	
Firm # 5	\$0.00	1	\$0.00	
Firm # 6	\$0.00	1	\$0.00	
Firm # 7	\$0.00	1	\$0.00	
Firm # 8	\$0.00	1	\$0.00	
Firm # 9	\$0.00	1	\$0.00	
Firm # 10	\$0.00	1	\$0.00	
Firm # 11	\$0.00	1	\$0.00	