



REQUEST FOR STANDING OFFER (RFSO)

Title	Registered Disability Savings Plan (RDSP), the Canada Disability Savings Grant and the Canada Disability Savings Bond Outreach
Solicitation Number	9985-12-0018
Solicitation Closing Date	July 15, 2013 (2:00 p.m.) Eastern Daylight Saving Time (EST)
Contracting Authority	Robert Hayman E-Mail: nc-solicitations-gd@hrsdc-rhdcc.gc.ca
Send Proposal To	Human Resources and Skills Development Canada Mail and Distribution Services HRSDC Bid Receiving Unit 140 Promenade du Portage Place du Portage, Phase IV, Level 01 Gatineau, Quebec K1A 0J9

Vendor/Firm Name: Address: Telephone No.: E-Mail: Fax No.:	
Name and title of person authorized to sign on behalf of vendor/firm (please print)	
Signature <hr/> The signature indicates acceptance of the terms and conditions set out herein	Date <hr/>

Complete, sign and include with your technical proposal



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ADDITIONAL INFORMATION FOR BIDDERS CAN BE FOUND AT THE FOLLOWING WEB SITE:

<http://www.hrsdc.gc.ca/eng/about/contracting/index.shtml>

The following shall apply to the contract:

- **Appendix E - General Conditions**
- **Appendix F – Supplementary Conditions**
- **Intellectual property – Crown to own Intellectual Property**



SECTION A

BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

This request for proposal (RFP) is issued by Human Resources and Skills Development Canada (HRSDC).

1. ACCEPTANCE OF TERMS AND CONDITIONS

The first page must be signed by the Bidder or by an authorized representative of the Bidder. Should the page not be signed at bid closing, the bidder will be allowed 24 hours to do so. The signature indicates that the Bidder agrees to be bound by the instructions, information and conditions in their entirety as they appear in this RFP. No other terms and conditions included in the Bidder's proposal will be applicable to the resulting contract notwithstanding the fact that the Bidder's proposal may become part of the resulting contract.

In the event of a proposal submitted by a joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture.

2. VENDOR PERFORMANCE

1. Canada may reject a bid where any of the following circumstances is present:

- (a) the Bidder, or any employee or subcontractor included as part of the bid, has been convicted under section 121 (Frauds on the government and Contractor subscribing to election fund), 124 (Selling or purchasing office), or 418 (Selling defective stores to Her Majesty) of the Criminal Code;
- (b) the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which renders the Bidder ineligible to bid on the Work;
- (c) an employee or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Policy, which would render that employee or subcontractor ineligible to bid on the Work, or the portion of the Work the employee or subcontractor is to perform;
- (d) with respect to current or prior transactions with the Government of Canada:
 - (i) the Bidder is bankrupt or where, for whatever reason, its activities are rendered inoperable for an extended period;
 - (ii) evidence, satisfactory to Canada, of fraud, bribery, fraudulent misrepresentation or failure to comply with any law protecting individuals against any manner of discrimination, has been received with respect to the Bidder, any of its employees or any subcontractor included as part of its bid;



- (iii) Canada has exercised its contractual remedies of suspension or termination for default with respect to a contract with the Bidder, any of its employees or any subcontractor included as part of its bid;
- (iv) Canada determines that the Bidder's performance on other contracts, including the efficiency and workmanship, as well as the extent to which the Bidder executed the work in accordance with contractual terms and conditions, is sufficiently poor to jeopardize the successful completion of the requirement being bid on.

2. Where Canada intends to reject a bid pursuant to a provision of paragraph 1, other than 1(b), the Contracting Authority will so inform the Bidder and provide the Bidder ten (10) calendar days within which to make representations, prior to making a final decision on the bid rejection.

3. ENQUIRIES REGARDING THE BID SOLICITATION

1. To ensure the integrity of the competitive bid process, enquiries and other communication regarding this procurement are to be directed **only** to the Contracting Authority in writing. Enquiries and other communication are not to be directed to any other government official(s). Failure to comply with this condition during the solicitation period may (for that reason alone) result in the disqualification of the proposal.

2. Enquiries **MUST** be received **no later than seven (7) calendar days** prior to bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be answered prior to the bid closing date.

3. To ensure consistency and quality of information provided to Bidders, provision will be made to provide, simultaneously to all Bidders to which this RFP has been sent, any information with respect to significant inquiries received and the replies to such inquiries without revealing the sources of the enquiries.

4. PROPOSAL COSTS

No payment shall be made for costs incurred in the preparation and submission of a proposal in response to this RFP.

No costs incurred before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resultant contract.

5. REVISIONS

After the RFP closing date, no revisions to the proposal or additional documentation will be accepted, unless requested by the Contracting Authority. During the evaluation, the Contracting Authority may, at their discretion, submit questions to Bidders to obtain clarifications.



6. RIGHTS OF CANADA

Canada reserves the right to:

- (a) reject any or all proposals received in response to this RFP;
- (b) enter into negotiations with Bidders on any or all aspects of their proposal;
- (c) accept any proposal in whole or in part without negotiations;
- (d) cancel and/or reissue this RFP at any time;
- (e) seek clarification and verify any or all information provided with respect to this RFP;
and
- (f) negotiate with the sole compliant Bidder to ensure best value to Canada.

7. PRICE SUPPORT

In the event that the Bidder's bid is the sole responsive bid received, the Bidder shall provide, on Human Resources and Skills Development Canada's request, one or more of the following as an acceptable price support;

- (a) a current published price list, indicating the percentage discount available to HRSDC, if applicable;
- (b) a copy of paid invoices for like services performed for other customers or for like items sold to other customers, as applicable;
- (c) a price breakdown showing, if applicable, the cost of direct labour, direct materials, purchased items, engineering and plant overheads, general and administrative overhead, transportation, profit, etc.

8. EXAMINATION OF BIDDER'S CAPABILITY

The Bidder agrees that, during the bid evaluation phase, representatives of Canada may conduct, at their discretion, a survey of the Bidder's proposed facilities and technical capabilities for performance of the Work described herein. The Bidder hereby agrees to make its facilities, including its resources and documentation, available for this purpose.

9. PRICING REVIEW

Bidders are advised that a review of the proposed pricing may be required by Canada. Detailed supporting data may be requested by Canada to validate the rates and other charges proposed.

10. APPLICABLE LAWS

Any resulting contract shall be interpreted and governed, and the relations between the Parties determined, by the laws in force in the Province of Ontario, Canada.

The Bidder may, at its discretion, substitute the applicable laws of a Canadian Province or territory of its choice without affecting the validity of its proposal, by deleting the name of the Canadian province



or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

11. CLOSURE OF GOVERNMENT OFFICES

Bidder personnel are employees of the Bidder and are paid by the Bidder on the basis of services rendered. Where the Bidder's employees are providing services on government premises pursuant to this Contract and the said premises become non accessible due to a strike or labour stoppage, evacuation or closure of government offices and consequently no work is being performed as a result of the closure, Canada will not be liable for payment to the Bidder for the period of the closure.

12. AUDITED FINANCIAL STATEMENTS

In order to confirm a Bidder's financial capability to perform the subject requirement, the contracting authority reserves the right to have access, during the proposal evaluation phase, to current Bidder financial information. If requested, the financial information to be provided shall include, but not be limited to, the Bidder's most recent audited financial statements or financial statements certified by the Bidder's Chief Financial Officer.

In the event that a proposal is deemed non-responsive because it was determined that the bidder does NOT have the required financial capability to perform the work, an official notice to this effect will be provided to them.

Should the Bidder provide the requested information to Canada in confidence while indicating that the disclosed information is confidential, then Canada will treat the information in a confidential manner as provided in the *Access to Information Act*.



SECTION B

SUBMISSION AND PREPARATION OF PROPOSALS

1. SUBMISSION OF PROPOSAL

ELECTRONIC BIDS WILL NOT BE ACCEPTED. Due to the nature of this solicitation, electronic transmission of a proposal by such means as electronic mail, facsimile, or commercial telex is not considered to be practical and, therefore, will not be accepted.

When responding, the proposal **MUST** be delivered to the following location, by the time and date indicated on the covering page of this RFP document:

HUMAN RESOURCES AND SKILLS DEVELOPMENT CANADA
MAIL AND DISTRIBUTION SERVICES
(HRSDC BID RECEIVING UNIT)
140 PROMENADE DU PORTAGE
PLACE DU PORTAGE, PHASE IV, LEVEL 01
GATINEAU, QUÉBEC
K1A 0J9

Telephone: 819-953-0675

The Bidder's name and return address, the solicitation number and the solicitation closing date and time should be clearly visible on the envelope or parcel containing the proposal. Proposals submitted in response to this RFP will not be returned.

2. PREPARATION OF PROPOSALS

Bidders shall prepare a proposal on 8 ½ x 11 paper, addressing all the requirements of this RFP.

It is requested that the Bidders submit their proposal in three parts (A,B and C) which **MUST BE BOUND SEPARATELY.**

Part A – Technical Proposal: four copies

Part B – Certification and Other Information: one copy

Part C – Security requirements: one copy

A – TECHNICAL PROPOSAL

The technical proposal should follow specific instructions as they are presented in Section F.



In order to facilitate the evaluation of the proposal, the Bidder is requested to address the mandatory and the point rated requirements in the order they are presented in the Statement of Work.

B – CERTIFICATIONS

Bidders are requested to sign and submit the attached certifications, Section E.

C – SECURITY REQUIRMENTS

Bidders are requested to complete and submit the attached security requirements, Section G



SECTION C

CONDITIONS PRECEDENT TO CONTRACT AWARD

In order to be considered for contract award, a bidder whose proposal is technically and financially responsive, must comply with the following conditions and must provide the necessary documentation to support compliance.

1. CONTRACT CAPACITY

The Bidder shall have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. In the case of a joint venture, the names and addresses of each member of the joint venture must be provided and the bid must clearly state that it is submitted as a joint venture.

2. NON-PERMANENT RESIDENT (FOREIGN BIDDER) (if applicable)

The Bidder shall ensure that non-permanent residents intending to work in Canada on a temporary basis in fulfillment of the Contract, who are neither Canadian citizens nor United States nationals, receive all appropriate documents and instructions relating to Canadian immigration requirements and secure all required employment authorizations prior to their arrival at the Canadian port of entry.

The Bidder shall ensure that United States nationals having such intentions receive all appropriate documents and instructions in that regard prior to their arrival at the Canadian port of entry. Such documents may be obtained at the appropriate Canadian Embassy/Consulate in the Bidder's country. The Bidder shall be responsible for all costs incurred as a result of non-compliance with immigration requirements.



SECTION D

FINANCIAL PROPOSAL

1. PROJECT TITLE

Registered Disability Savings Plan (RDSP), the Canada Disability Savings Grant and the Canada Disability Savings Bond Outreach

2. FINANCIAL CONTENT

The Undersigned hereby offers to Her Majesty the Queen in Right of Canada, as requested by the Minister, to furnish all expertise, materials, equipments and others things necessary to the entire satisfaction of the Minister or his authorized representative, the work as described in the RFSO according to the terms and conditions of the Department.

3. FINANCIAL PROPOSAL

The bidder should not submit a financial proposal

4. PROPOSED BASIS OF PAYMENT

The Contractor shall be paid the prices specified in Section 8.0 DELIVERABLES of the Statement of work in Canadian funds.

5. METHOD OF PAYMENT

Payment shall be made within thirty (30) days following the date on which an invoice and substantiating documentation are received according to the terms of the contract.

6. INVOICING INSTRUCTIONS

The invoice **MUST** clearly state the date, contract number, the deliverable/task and the GST number. Any amount to be levied against Her Majesty in respect of the GST/HST is to be shown separately on all invoices for goods supplied or services provided and will be paid by the Government of Canada. The Bidder agrees to remit any GST/HST paid or due to CRA.



SECTION E

CERTIFICATIONS

BIDDER CERTIFICATION

We hereby certify that all information provided herein is accurate. Furthermore we have satisfied ourselves that the personnel proposed by us for this requirement is capable of satisfactorily performing the requirement described herein. In addition, we certify that individuals proposed will be available until completion of the project. Also that the work specified herein can be met in a timely manner, and will be achieved within the time frame allocated.

Signature of Authorized Representative

Date

VALIDITY PERIOD

The Undersigned agree(s) that this Proposal will remain firm for a period of 90 calendar days after the proposal closing date.

Signature of Authorized Representative

Date

LANGUAGE CAPABILITY

The Bidder certified that it has the language capability required to perform the Work, as stipulated in the Statement of Work.

Signature of Authorized Representative

Date



EDUCATION AND EXPERIENCE

The Bidder hereby certifies that all the information provided in the résumés and supporting material submitted with its proposal, particularly as this information pertains to education achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that the individuals proposed by the Bidder for the requirement are capable of satisfactorily performing the Work described herein.

Should a verification by the Minister disclose untrue statements, the Minister shall have the right to declare the proposal non responsive and, pursuant to the default provisions of any resulting contract, terminate any such contract for default.

Signature of Authorized Representative

Date

STATUS AND AVAILABILITY OF RESOURCES

The Bidder certifies that, should it be requested to provide services under any contract resulting from this solicitation, the persons proposed in its proposal will be available to commence performance of the work as required by the Project Authority and at the time specified within or agreed to with the Project Authority.

If the Bidder has proposed any person in fulfillment of this requirement who is not an employee of the Bidder, the Bidder hereby certifies that it has the written permission from such person to propose his/her services in relation to the Work to be performed in fulfillment of this requirement and to submit such person’s résumé to the Contracting Authority.

Signature of Authorized Representative

Date

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY

(OVER \$200,000) IF APPLICABLE

The FCP-EE requires that some organizations bidding for federal government contracts, valued at \$200,000 or more, make a formal commitment to implement employment equity, as a condition precedent to the contract award. If the Bidder is subject to the Program, evidence of its commitment **MUST** be provided prior to the award of any contract.



Note: Contractors that have been declared “Ineligible Contractors” by HRSDC-Labour http://fas-sfa.hq-ac.prv/admin/policies/E_fedcontractors-eequity.shtml are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the GCR (currently at \$25,000), either as a result of a finding of non-compliance by HRSDC-Labour, or following their voluntary withdrawal from the Program for a reason other than the reduction in their workforce. Any bid from ineligible contractors will not be considered for award.

The Bidder is required to certify to its status with FCP-EE, as follows:

The Bidder a.() is not subject to FCP-EE, having a workforce of less than 100 persons in Canada,

b.() is not subject to FCP-EE, being a regulated employer under the *Employment Equity Act*;

c.() is subject to the requirements of FCP-EE, having a workforce of 100 persons or more, but has not previously obtained a certificate number from HRSDC-Labour, (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is provided herewith (attached);

d.() is subject to FCP-EE, and has a valid certification number as follows: _____ (i.e. has not been declared “Ineligible Contractor” by HRSDC-Labour).

If the Bidder does not fall within the exceptions enumerated in (a) or (b), the Program requirements do apply, and as such, the Bidder is required to submit a Certificate of Commitment DULY SIGNED as referenced below or a valid Certificate number confirming its adherence to the FCP-EE.

The Bidder acknowledges that the Minister shall rely on this certification to award the contract.

Should verification by the Minister disclose a misrepresentation on the part of the Bidder, the Minister shall have the right to treat any contract resulting from this bid as being in default.

In all cases, the Bidder is required to produce evidence or supporting information on demand prior to contract award, if such evidence is not included with its bid.

Signature of Authorized Representative

Date

FORMER PUBLIC SERVANTS

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, Bidders must provide the information required below.

Definitions

For the purpose of this clause,



“former public servant” means a 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 and includes:

- 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 size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means, 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 Bidder a FPS in receipt of a pension as defined above? **YES ()** **NO ()**

(Note that the information provided in response to the question above may be disclosed publicly, consistent with Treasury Board Policy (http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/ContPolNotices/2012/10-31-eng.asp))

If so, the Bidder must provide the following information:

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

Work Force Reduction Program

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

If so, the Bidder must provide the following information:



- 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; and
- 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 Goods and Services Tax or Harmonized Sales Tax.

Signature of authorized representative: _____ Date: _____



Terms of Reference

1. Project Title

Registered Disability Savings Plan (RDSP), the Canada Disability Savings Grant and the Canada Disability Savings Bond Outreach

2. Purpose

Human Resources and Skills Development Canada (HRSDC), through the Office for Disability Issues (ODI) is seeking to establish multiple Standing Offer Agreements (SOAs) with small and large organizations alike, to provide information sessions and one-on-one personal assistance to disability-diverse populations and their families to learn about and apply for the RDSP, the grant and the bond.

Information about the RDSP, the grant and the bond may be found at <http://www.hrsdc.gc.ca/eng/disability/savings/index.shtml>.

3. Standing Offers

What are standing offers?

A standing offer is not a contract. A standing offer is an offer from a potential supplier to provide goods and/or services at pre-arranged prices, under set terms and conditions, when and if required. It is not a contract until the government issues a "call-up" against the standing offer. The government is under no actual obligation to purchase until that time.

When are standing offers used?

Standing offers are used to meet recurring needs when departments or agencies are repeatedly ordering the same goods or services. They may also be used when a department or agency anticipates a need for a variety of goods or services for a specific purpose; however, the actual demand is not known and delivery is to be made when a requirement arises.

Standing offers are most suited to goods or services that can be clearly defined to allow suppliers to make firm offers.

Why are standing offers used?

The standing offer is a convenient method of supply that saves time and money. Once a standing offer is issued, the department or agency deals with you directly to obtain the goods or services they need. Call-ups against a standing offer are processed faster, involve less paperwork and have pre-set prices and terms already determined. For



taxpayers, the advantages are lower government administrative costs and reduced inventory.

When a standing offer is issued to your organization, you are offering to provide certain goods or services over a specified period of time. If and when the government issues a call-up against your standing offer, only then do you have a contract for the amount indicated in the call-up.

4. Request for a Standing Offer Process

In an effort to establish a pan-Canadian outreach the Department has chosen to divide the provinces and territories into five (5) geographical regions with a maximum of ten (10) Standing Offer Agreements (SOAs) to be awarded in each as illustrated below:

1. Atlantic

- Newfoundland and Labrador
- Prince Edward Island
- Nova Scotia
- New Brunswick

2. Québec

3. Ontario

4. Prairies

- Manitoba
- Saskatchewan

5. West North

- Alberta
- British Columbia
- Nunavut
- Northwest Territories
- Yukon

Thus there will be a maximum of fifty (50) Standing Offer Agreements awarded.

Bidders may bid on a single geographical region or parts thereof, multiple geographical regions or parts thereof or all geographical regions or parts thereof. Regardless of the number of geographical regions for which the Bidder wishes to be considered, **only submit one proposal**. However, the proposal must clearly indicate for which geographical region(s) the Bidder wishes to be considered.

Scope of coverage is not part of the evaluation; organizations who can only reach a small area within a geographical region are encouraged to submit a bid.

Proposals will be assessed separately for each geographical region and winning Bidders will be the Bidder(s) who achieve the highest technical merit score(s).



HRSDC reserves the right to allow for expanded Outreach after SOA award should an SOA holder demonstrate increased capacity.

5. Background of the Registered Disability Savings Plan (RDSP)

The Registered Disability Savings Plan (RDSP) is a long-term savings plan intended to assist people with disabilities and their families save for the future. The RDSP became available to Canadians in December 2008. The RDSP is administered by the Canada Revenue Agency. The Government of Canada, through HRSDC, may provide two types of deposits into RDSPs to further help people save:

- A matching grant, dependent upon the amount of private contributions made to the RDSP and the beneficiary's family income, and;
- A bond, for low - to modest - income beneficiaries, dependent only upon on the beneficiary's family income. Private contributions are not required to receive a bond.

Subsequent Federal Budgets have announced many enhancements to the RDSP. Since the Program became available, HRSDC has undertaken a number of pan-Canadian initiatives to create awareness about the RDSP, grant and bond. However, the Department continues to have limited capacity to fulfill the breadth of its current and anticipated requirements for Program promotion, awareness and understanding, particularly for hard-to-reach populations, and given the many Program enhancements announced in Budgets 2010, 2011 and 2012. Therefore, HRSDC seeks the services of non-governmental organizations with direct access to people with disabilities and their families that have the capacity and expertise required to undertake the development, preparation and implementation of the Outreach.

6. Statement of Work

The Standing Offer Agreement holder will be required to undertake the following:

Information sessions: Through publicly-available group information sessions (e.g. in-person, webinars), Standing Offer Agreement holder(s) will provide individuals with disabilities and their families with information on the RDSP, grant and bond; and

One-on-one assistance: The Standing Offer Agreement holder(s) will offer personal support to individuals (e.g. face-to-face, telephone, e-mail) to improve understanding of the Program, and to assist applicants to obtain appropriate documentation, interact with financial institutions, and/or to complete application forms.



In addition to the facilitation of the sessions and administrative support as required, the SOA holder will be required to undertake the following:

Project Management and Reporting

- Design an overall strategy and approach to outreach which includes public information sessions and one-on-one assistance, and submit them to HRSDC (Project Authority) for approval;
- Create work plans that include levels of effort and cost estimates for reimbursable expenses, submit them to the Project Authority for approval, and execute them as approved. Revise and obtain approval from the Project Authority, as appropriate, to meet changing needs and requirements;
- Verify references and ensure that staff persons and sub-contractors have obtained a level of Reliability Security Status. The Project Authority will provide the relevant application form;
- Ensure that policies and procedures are in place to guarantee that participants' privacy is respected and private information is protected, in compliance with the Personal Information Protection and Electronic Documents Act. Guidance will be provided by the Project Authority;
- Meet periodically with the Project Authority (in person or by teleconference) to monitor and discuss progress;
- Prepare and submit monthly invoices – no later than 10 business days after the last day of the month – to the Project Authority
 - All supporting documentation (e.g. original receipts, time sheets) must accompany the invoices at time of submission.
 - All Per Diem rates, travel expenses and miscellaneous costs must comply with the basis of payment and the contract (call-up).
- Prepare and submit regular reports to the Project Authority – on a pre-determined schedule – on project status, activities (e.g. number of attendees, number of persons directly assisted, characteristics of target population reached), methods used, milestones, deliverables, and evaluation of the impact of events against the objectives (templates will be provided);
- Prepare and submit a final report to the Project Authority at the end of the contract (template to be provided).

Event Management

- Prepare and execute a plan that fulfills the defined needs of the event (e.g. information session, one-on-one activity)



- Translate presentation and promotional materials. It is the organization's responsibility to perform a quality control on the translated materials. Translation is an eligible, reimbursable expense;
- Arrange equipment rental (If necessary) in compliance with eligible, reimbursable expenses. A list of eligible expenses in this category will be provided by the Project Authority. Capital purchases are not an eligible expense;
- Arrange rental of meeting space (if events are not held at the SOA holder's premises), in compliance with maximum allowable rental rates;
- Provide meeting locations that are accessible to people with disabilities; including, but not limited to, a ramp to entrance, sufficient space, accessible washrooms, scent-free environment;
- Accommodate the individual needs of people with disabilities; including, but not limited to, ASL interpretation, bliss board interpretation, closed-captioning. Accommodations are an eligible, reimbursable expense;
- Arrange for simultaneous interpretation (if required). This is an eligible, reimbursable expense;
- Establish participant recruitment and registration procedures for information sessions. All advertising/promotion materials will require prior approval by the Project Authority to ensure adherence to the Federal Identity Program, and other policies. The Project Authority will provide a template. The organization shall submit these materials for approval no later than 10 working days before their intended publication;
- Ensure the privacy of participants is safeguarded, in compliance with the Personal Information Protection and Electronic Documents Act;
- Arrange for the production, printing, and distribution of related material which is in addition to those provided by the Project Authority.

7. Period of Standing Offer

The period for placing call-ups and rendering services against the standing offer shall be from the date of award for a period of two years, with two additional one-year options at the discretion of HRSDC.

The SOA holder grants to HRSDC the irrevocable option to extend the term of the standing offer by up to two additional one year period(s) under the same terms and conditions. The SOA holder agrees that, during the extended period of the standing, it will be paid in accordance with the applicable provisions set out in the Basis of Payment.

HRSDC may exercise this option at any time by sending a written notice to the SOA holder at least 30 calendar days before the expiry date of the standing offer the option may only be exercised by the Contracting Authority, and will be evidenced, for administrative purposes only, through a formal SOA amendment.



8. Financial Limitation Per Call-Ups

Each call-up **will not exceed** \$200,000 (including applicable taxes).

HRSDC reserves the right to negotiate any of the financial elements (per diem, level of effort by function, and cost per information session or one-on-one support) noted below in regards to contracts with winning Bidders as a result of this RFSO.

The following information is stated in Canadian funds.

- a. **Per Diem Rate** – Daily rates based on 7.5 hours exclusive of meal and breaks have been set by function as follows

Year 1

Project Management and Reporting - \$500
Event Management - \$400
Facilitation - \$400
Administration - \$250

Year 2

Project Management and Reporting - \$525
Event Management - \$420
Facilitation - \$420
Administration - \$260

Option Year 3

Project Management and Reporting - \$550
Event Management - \$440
Facilitation - \$440
Administration - \$275

Option Year 4

Project Management and Reporting - \$575
Event Management - \$460
Facilitation - \$460
Administration - \$290

Payments shall be for actual days worked with no provision for annual leave, statutory holidays and sick leave. For work performed for duration more or less than one (1) day, the daily rate will be prorated accordingly to cover the actual time worked. No overtime will be paid.

The per diem rate is ALL INCLUSIVE excluding applicable taxes. Charges for expenses which are normally incurred in the provision of services, such as, labour for conducting negotiations and providing estimates, resolving contract disputes, tracking time sheets,



monthly invoicing, facsimile, copying/printing charges, office supplies, courier and long distance telephone charges, are included in the rates and will not be permitted as additional charges to the call-up.

It is important to note that level of effort (hours per function for each information session or one-on-one support) may be negotiated during the contracting phase.

- b. **Travel and living (as applicable)** – The Standing Offer holders will be paid for pre-authorized reasonable and proper travel and living expenses incurred by individuals directly engaged in the performance of the work, supported by appropriate receipts and calculated in accordance with the current Treasury Board Guidelines on Travel and Living Expenses Web Site: http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/menu-travel-voyage_e.asp without allowance thereon for overhead or profit. All payments are subject to government audit.

- c. **Miscellaneous Expenses (as applicable)** - The Standing Offer holders will be paid for pre-authorized reasonable and proper miscellaneous expenses supported by receipts at actual cost without allowance thereon for overhead or profit (including, but not limited to, expenses for meeting room and audio-visual equipment rentals, translation services, advertising, American Sign Language (ASL) interpretation, etc.). A list of eligible expenses will be provided to successful Bidders.

For reference purposes, the average cost per information session, including per diem fees, travel, living and miscellaneous costs, is approximately \$500-\$1,500, and contracts could be negotiated for the delivery of up to 70 information sessions per contract. As noted above, HRSDC reserves the right to negotiate any element regarding financial cost at the contracting stage.

9. Call-Up Procedure

The Project Authority will choose which organization(s) will be selected to execute the work, as need arises.

Selection of the SOA holder:

SOA holders will be called upon to provide services on an “as and when requested basis”.

SOA holders may be selected for a call-up based on:

- background and experience in the subject matter;
- cost;
- capacity to carry out the work (e.g. geographic location, established formal/informal networks); and
- availability to supply the services at the time a call-up is made.



The Project Authority will make best efforts to rotate work among SOA holders as appropriate.

Prior to issuing a call-up against an SOA, an HRSDC representative will contact an SOA holder to determine the availability of individuals listed in the proposal. In the event that the individuals listed in the offer are not available to work on a specific project and replacements acceptable to the Project Authority are not available, or if the organization is unable to commit the time that the Project Authority deems to be required, then the Project Authority, at its discretion, may decide against proceeding with a call-up with that organization and select another SOA holder to provide the required services.

The specific scope, timeline and deliverables will be defined within each call-up issued under the terms and conditions of the SOAs.

The Contractor will ensure that the included “practical guide to outreach contracts” will be read in full by all project managers, event planners and facilitators doing work under the contract. Written confirmation that it has been read and understood will be required within two weeks following the contract signature date.

Before commencing work, the SOA holder must be in possession of a Call-Up Against a Standing Offer duly authorized by the Contracting Authority.

10. Intellectual Property

The Intellectual property will vest with the Crown. The Minister of Human Resources and Skills Development Canada has determined that any intellectual property arising from the performance of the work under the contract will vest in Canada;

Where the main purpose of the Crown Procurement Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

“Crown to Own the Intellectual Property” clauses will apply to the Standing Offer Agreements and can be found on the following internet link:

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4007/3>.

11. Security Requirements

- The Contractor’s personnel, including sub-contractors, who could potentially come in contact with personal PROTECTED information, must each hold a valid Reliability Security Status at all times during the performance of the Contract;
- Until the security screening of the Contractor’s personnel, including sub-contractors, have been completed, the individual MAY NOT engage in any activities whereby they may come in contact with personal information;



- The Contractor's personnel, including sub-contractors, are required to treat and manage all personnel information at level of PROTECTED B;
- The Contractor's personnel, including sub-contractors, are NOT authorised to store protected information on its premises.

12. Disclosure or Collection of Personal Information

This requirement will involve the disclosure of information to third parties and/or the collection of personal information by third parties.

1. a) For the purpose of performing the work under the contract, the Contractor may collect, on behalf of HRSDC and to the exclusion of all other information, the following information:

- Social Insurance Number
- Date of birth
- Address
- Banking information
- Income tax information
- Any personal information

b) For the purpose of performing the work under the contract, the Contractor may collect, on behalf of HRSDC, information such as demographic information, attitudes and opinions.

2. The Contractor shall collect the information referred to in section 1 above, directly from the individuals to whom that information relates unless the individuals authorise collection from another source or the direct collection of information might result in the collection of inaccurate information.

3. The Contractor shall inform the individuals of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.

4. The Contractor shall make every effort to ensure the accuracy of the information collected pursuant to section 1 above.

5. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not collect, use or disclose the information referred to in section 1 above except for the purpose of performing the work under the contract.

6. The Contractor shall maintain all information referred to in section 1 above, and make sure it is only accessible, in Canada.



7. The Contractor shall segregate all records containing information referred to in section 1 above (whether in electronic format or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside Canada.

8. The Contractor shall ensure that all aspects of the processing of information referred to in section 1 above are conducted and only accessible in Canada.

9. The Contractor shall take all necessary measures to ensure that every person it hires, or the services of whom it retains to fulfill its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in section 1 above.

10. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in section 1 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.

11. The information referred to in section 1 above remains at all times under the control of HRSDC.

12. The information referred to in section 1 above is protected by the Privacy Act and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the HRSDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that HRSDC may issue.

13. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in section 1 above except with the written consent of HRSDC.

14. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall destroy the information referred to in section 1 above and copies thereof, if any.

15. All information shall be destroyed in accordance with the HRSDC Security Policy and Procedures Manual or other instructions that HRSDC may issue.

16. The Contractor's premises shall be open for inspection by authorized representatives of HRSDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.

17. The Contractor shall notify HRSDC immediately after he becomes aware that a



breach of any provision of this contract governing the protection of personal information has occurred.

18. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by HRSDC.



EVALUATION CRITERIA

All required information must be provided within the proposal. HRSDC will NOT consider any additional information not submitted with the proposal, such as referrals to:

web sites;

technical manuals or brochures not submitted with the proposal; or

existing standing offers, supply arrangements or contracts with the Government of Canada.

Mandatory Requirements

The mandatory requirement listed below will be evaluated on a compliant / non-compliant basis. Proposals that fail to meet the mandatory requirement will be disqualified at this stage without further consideration.

Requirement Number	Description(s)	Page No. / Paragraph no.	Compliant / not compliant
M-1	<p>Bidders MUST have:</p> <ul style="list-style-type: none"> • five or more years in operation; and • a minimum of three years of experience within the past 5 years either <p>1. Working with the disability community;</p> <p>or</p> <p>2. Planning and delivering information sessions to the disability community;</p> <p>or</p>		



	3. Planning and delivering community events to members of the disability community.		
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Rated Evaluation Requirements

The criteria contained herein will be used by HRSDC to evaluate each proposal where the mandatory requirements have been met. Bidders are advised to address these requirements in the order presented, where possible, and with sufficient depth to permit a thorough assessment. Each proposal will be evaluated solely on content contained within.

An item not addressed in the proposal will be given zero (0) points under the point rated system.

Highest Technical Merit

Only those proposals that are compliant with the Mandatory Requirement and that achieve a score of sixty per cent (60%) or better overall in the Rated Requirements Evaluation will be considered for SOA award.



Point-Rated Requirement

Item No	Description	Points
<p>R-1</p>	<p>Alignment with objectives of the project and relevant experience</p> <p>Bidders should demonstrate:</p> <p>That the mission and mandate of the Bidder and the population served, align with the objectives of the delivery of the information sessions and provision of one-on-one support by:</p> <ul style="list-style-type: none"> • providing examples of three previous projects similar to the work described in the Statement of Work, including: <ul style="list-style-type: none"> ○ a brief description of the work ○ whether the work was performed for the organization`s own membership, or an external client, dates and duration of the work ○ outcomes, e.g. challenges and accomplishments <p>Each example will be rated based on the extent to which it demonstrates alignment with the objectives of the project (maximum 5 points per example)</p>	<p>Maximum of 15 points</p> <p><u>Point Scale for requirements of 5 points</u></p> <p>Excellent: 5 Very Good: 4 Good: 3 Inadequate: 2 or less</p>
<p>R-2</p>	<p>Organizational Structure</p> <p>Bidders should provide:</p> <ul style="list-style-type: none"> • The governance structure of the organization, showing how the management of this project will be incorporated if the Bidder is successful in this process. (10) <p>This information may be submitted in narrative form; points will be awarded based on concrete examples provided.</p>	<p>Maximum of 10 points</p> <p><u>Point Scale for Requirements of 10 points</u></p> <p>Excellent: 10 Very Good: 7-9 Good: 5-6 Inadequate: 4 or less</p>



Item No	Description	Points
<p>R-3</p>	<p>Understanding of the project objectives and requirements</p> <p>Bidders should clearly demonstrate that they understand:</p> <ul style="list-style-type: none"> • The diverse population that is eligible for the RDSP, the grant and the bond; (10) • The challenges and/or barriers that may hinder or discourage individuals from learning about, understanding and opening an RDSP; (15) • How to promote the availability of information sessions and one-on-one support to maximize reach to all potentially eligible persons with disabilities, as well as those who are particularly likely to have the most difficulty accessing the RDSP, the grant and the bond; (10) and • The format(s) for information sessions and one-on-one support to ensure accessibility and inclusivity, and to best engage and foster learning amongst all potentially eligibility persons with disabilities, as well as those who are particularly likely to have the most difficulty accessing the RDSP, the grant and the bond. (15) 	<p>Maximum of 50 points</p> <p><u>Point Scale for Requirements of 10 points</u></p> <p>Excellent: 10 Very Good: 7-9 Good: 5-6 Inadequate: 4 or less</p> <p>---</p> <p><u>Point Scale for Requirements of 15 points</u></p> <p>Excellent: 15 Very Good: 11-14 Good: 8-10 Inadequate: 7 or less</p>



Item No	Description	Points
R-4	<p>Ability to provide service</p> <p>Bidders should clearly demonstrate the capacity necessary to provide service in the geographical regions(s) or part(s) thereof outlined within their proposal:</p> <ul style="list-style-type: none"> Bidders should describe any satellite/regional offices under their governance (i.e. offices that can be mandated to undertake work) that will deliver information sessions and one-on-one support; <p style="text-align: center;">and/or</p> <ul style="list-style-type: none"> Bidders should describe established partnerships with other organizations with whom they will collaborate. <p>For the purposes of this submission, “partnership” is defined as, but not limited to, local chapter organizations, federation membership organizations, and/or coalitions/alliances with which the Bidders are affiliated.</p> <p>For those partnerships described, letters of support must accompany the submission, and must clearly articulate how affiliates will collaborate with Bidders to maximize reach of delivery in order for points to be awarded.</p> <p><i>It is not sufficient to submit letters that only acknowledge support for the initiative.</i></p> <p>Given that Bidders may be able to maximize reach by either one or both of the above two methods combined, Bidders will be evaluated on their overall demonstrated reach (25)</p>	<p>Maximum of 25 points</p> <p style="text-align: center;"><u>Point Scale for Requirements of 25 points</u></p> <p style="text-align: center;">Excellent: 25 Very Good: 19-24 Good: 13-18 Inadequate: 12 or less</p>



Item No	Description	Points
R5	<p>Bidders should clearly demonstrate the capacity necessary to provide service in the geographical regions(s) or part(s) thereof outlined within their proposal:</p> <ul style="list-style-type: none"> Bidders should describe the scope of their informal networks through which they will promote information sessions and one-on-one support (e.g. community newsletters / bulletin boards, space on website(s) of local NGOs, etc.) (15) 	<p><u>Point Scale for Requirements of 15 points</u></p> <p>Excellent: 15 Very Good: 11-14 Good: 8-10 Inadequate: 7 or less</p>
R-6	<p>Ability to reach those persons with disabilities who are likely to have the most difficulty accessing the RDSP, the grant and the bond</p> <p>R-3 speaks to the diversity of the population eligible for the RDSP, the grant and the bond. Building on R-3, Bidders should describe their connectedness to, and ability to reach and engage people with disabilities who are particularly likely to have the most difficulty accessing the RDSP, the grant and the bond. In particular:</p> <ul style="list-style-type: none"> Bidders should describe the particular population, and why they require targeted/customized outreach; (10) and Bidders should describe how they are well-positioned to reach this population, for example, it's the population that they serve, and/or they have established relationships with organizations that provide services and supports to this population. (10) 	<p>Maximum of 20 points</p> <p><u>Point Scale for Requirements of 10 points</u></p> <p>Excellent: 10 Very Good: 7-9 Good: 5-6 Inadequate: 4 or less</p>



Item No	Description	Points
R-7	<p>Ability to plan, implement and manage the project</p> <p>Bidders should clearly indicate how they will meet all project requirements in compliance with the Statement of Work. In particular, the proposal should:</p> <ul style="list-style-type: none"> • Include a detailed work plan*, demonstrating how they will develop and deliver information sessions and provide one-on-one support. The work plan should include approaches, methodologies, milestones, timelines and deliverables for all activities specified in the Statement of Work; (20) <p><i>* The project authority recognizes that certain information, such as costs and specific dates, cannot be included without knowing the budget, duration of a contract and number of sessions to be provided (if they are successful). However, this should not preclude them from articulating a well-constructed work plan. For example, they may use placeholders such as ``six weeks before the information session, the Event Manager will... ``</i></p> <ul style="list-style-type: none"> • Describe how they will manage the overall project and work with partners using various planning, communications and reporting tools. Bidders are encouraged to provide concrete examples of how they currently employ these management techniques. The management strategy should complement the work plan, describing how the Project Manager will monitor progress, respond to operational issues, ensure timely collection of information receipts / invoices from partners (and sub-contractors, if applicable) to fulfill reporting and invoicing requirements for the Project Authority, and ensure that all contractual obligations are being met; (20) and • Describe the methodology that will be used to protect individuals' privacy and personal information. (10) 	<p>Maximum of 50 points</p> <p><u>Point Scale for Requirements of 10 points</u></p> <p>Excellent: 10 Very Good: 7-9 Good: 5-6 Inadequate: 4 or less</p> <p><u>Point Scale for Requirements of 20 points</u></p> <p>Excellent: 20 Very Good: 15-19 Good: 10-14 Inadequate: 9 or less</p>



Item No	Description	Points
	<p style="text-align: center;">Maximum points - 185 Minimum points required to be considered for SOA award - 111</p>	