



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

**LETTER OF INTEREST**  
**LETTRE D'INTÉRÊT**

Comments - Commentaires

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

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

|   |  |
|---|--|
| <b>Title - Sujet</b><br>CFC Event Management Services   |  |
| <b>Solicitation No. - N° de l'invitation</b><br>W8160-130009/A  | <b>Date</b><br>2013-06-27  |
| <b>Client Reference No. - N° de référence du client</b><br>W8160-13-0009  | <b>GETS Ref. No. - N° de réf. de SEAG</b><br>PW-\$\$CX-004-62986 |
| <b>File No. - N° de dossier</b><br>cx004.W8160-130009   | <b>CCC No./N° CCC - FMS No./N° VME</b>                           |
| <b>Solicitation Closes - L'invitation prend fin</b><br><b>at - à 02:00 PM</b><br><b>on - le 2013-07-12</b>  |  |
| <b>Time Zone</b><br><b>Fuseau horaire</b><br>Eastern Daylight Saving<br>Time EDT  |  |
| <b>F.O.B. - F.A.B.</b><br><b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>   |  |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>York(CX Div.), Rochelle  | <b>Buyer Id - Id de l'acheteur</b><br>cx004                      |
| <b>Telephone No. - N° de téléphone</b><br>(613) 998-8408 ( )  | <b>FAX No. - N° de FAX</b><br>(613) 993-2581                     |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b><br>DEPARTMENT OF NATIONAL DEFENCE<br>215 YONGE BLVD<br>TORONTO<br>Ontario<br>M5M3H9<br>Canada |  |

Instructions: See Herein

Instructions: Voir aux présentes

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

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**NOTE: This is not a bid solicitation. This RFIC will not result in the award of any Standing Offer or contract, therefore, respondents should not submit a proposal in response to the document below. This RFIC is simply intended to solicit feedback from industry with respect to the matters described in this RFIC.**

**SOME SPECIFIC QUESTIONS:**

1. In your opinion, is a Standing Offer the appropriate procurement approach for the type of work described herein?
2. In your opinion, is the proposed Evaluation Criteria appropriate for the requirements described in the Statement of Work? If not, why?
3. In your opinion, are there any requirements and/or items, described in the Statement of Work (SOW) or Evaluation Criteria, that are unclear or that would unduly limit a qualified vendor's ability to submit a response?

**CANADIAN FORCES COLLEGE (CFC) EVENT MANAGEMENT SERVICES**

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## PART 1 - GENERAL INFORMATION

### 1. Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- |        |   |
|--------|---|
| Part 1 | General Information: provides a general description of the requirement;   |
| Part 2 | Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;   |
| Part 3 | Offer Preparation Instructions: provides offerors with instructions on how to prepare their offer to address the evaluation criteria specified;   |
| Part 4 | Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection; |
| Part 5 | Certifications: includes the certifications to be provided;   |
| Part 6 | Insurance Requirements: includes specific requirements that must be addressed by offerors; and  |
| Part 7 | 7A, Standing Offer, and 7B, Resulting Contract Clauses:   |
- 7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;
- 7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes include the Statement of Work, the Basis of Payment, the Insurance Requirements, the Standing Offer Reporting Requirements, and the Evaluation Grids. The Appendices include the M.2 Experience of Proposed Resources - Sample Fact Sheet and the M.3 Experience of the Firm - Sample Fact Sheet.

### 2. Summary

The Canadian Forces College (CFC) requires support to plan, arrange and conduct events as part of its educational mandate, on an as and when requested basis. Events to be held at CFC include short programmes, symposiums, operational exercises and convocation ceremonies. Occasionally, these events are required to be held at other sites in Toronto or elsewhere in Canada. Events planned to be held outside CFC include operational exercises and programme trips, in the form of Experiential Learning Visits (ELVs), to Canadian and international cities to visit military, government, multinational and commercial institutions, facilities and think tanks.

The Identified User authorized to make call-ups against the Standing Offer is the Department of National Defence (DND) - Canadian Forces College (CFC).

The period for making call-ups against the Standing Offer is from August 1, 2013 to July 31, 2014. If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for two

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additional one-year periods, from August 1, 2014 to July 31, 2015 and from August 1, 2015 to July 31, 2016.

One (1) Standing Offer will be issued as a result of this RFSO.

Individual call-ups against the Standing Offer must not exceed **\$500,000.00** (Applicable Taxes included).

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of **\$1,495,000.00** (Applicable Taxes excluded) unless otherwise authorized in writing by the Standing Offer Authority.

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

Special instructions:

Offerors must submit a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2006.

Offerors in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the RFSO.

### **3. Debriefings**

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority **within 15 working days** of receipt of the results of the request for standing offers process. The debriefing will be in writing.

## PART 2 - OFFEROR INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

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

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2013-06-01) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

#### 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.

### 2. Submission of Offers

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

**Offers must be submitted by 2:00 pm Eastern Daylight Time (EDT) on TBD 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 Standing Offers, transmission of offers by facsimile to PWGSC will not be accepted.

### 3. Former Public Servant

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

## Definitions

For the purposes of this clause,

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

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

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

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c. C-17, the Defence Services Pension Continuation Act, 1970, c. D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c. R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c. R-11, the Members of Parliament Retiring Allowances Act, R.S. 1985, c. M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c. C-8.

### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Offeror a FPS in receipt of a pension?

YES ( ) NO ( )

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

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

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

### Work Force Reduction Program

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

YES ( ) NO ( )

If so, the Offeror 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 fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

### **3. Enquiries - Request for Standing Offers**

All enquiries must be submitted in writing to the Standing Offer Authority no later than **seven (7) calendar days** before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

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

### **4. Applicable Laws**

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

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 offerors.

## PART 3 - OFFER PREPARATION INSTRUCTIONS

### 1. Offer Preparation Instructions

Canada requests that offerors provide their offer in separately bound sections as follows:

**Section I: Technical Offer (2 hard copies and 1 soft copy on CD, DVD, or USB key),**  
**Section II: Financial Offer (2 hard copies and 1 soft copy on CD, DVD, or USB key),**  
**Section III: Certifications (2 hard copies)**

Offerors should clearly label all hard and soft copies of their offers with their firm's 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.

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

Canada requests that offerors follow the format instructions described below in the preparation of their offer.

- a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b) use a numbering system that corresponds to that of the Request for Standing Offers; and
- a) no plastic covers or binders, if possible. Please be considerate of the environment.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](#)

(<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>).

To assist Canada in reaching its objectives, offerors should:

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

#### **Section I: Technical Offer**

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

#### **Section II: Financial Offer**

Offerors must submit their financial offer in accordance with the Basis of Payment in **Annex "B"**. The total amount of Applicable Taxes must be shown separately, if applicable.

#### **Payment by Credit Card**

Canada requests that offerors complete one of the following:

- a) ( ) Government of Canada Acquisition Cards (credit cards) will be accepted for payment of call-ups against the standing offer.

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The following credit card(s) are accepted:

VISA \_\_\_\_\_

Master Card \_\_\_\_\_

- b)     ( )     Government of Canada Acquisition Cards (credit cards) will not be accepted for payment of call-ups against the standing offer.

The Offeror is not obligated to accept payment by credit card.

Acceptance of credit cards for payment of call-ups will not be considered as an evaluation criterion.

**Section III: Certifications**

Offerors must submit the certifications required under Part 5.

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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

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

#### 1.1. Technical Evaluation

##### 1.1.1 Mandatory Technical Criteria

##### M.1 FINANCIAL OFFER

The Offeror must provide costing information strictly in accordance with Annex "B" Basis of Payment.

##### M.2 EXPERIENCE OF PROPOSED RESOURCES

The Offeror must identify two (2) resources, a Primary Senior Event Manager and a Back-up Senior Event Manager.

The Offeror must identify three (3) event management project samples for each of the Primary Senior Event Manager and the Back-up Senior Event Manager. The same event management project sample may not be used to demonstrate the experience of both the Primary and the Back-up Senior Event Manager. An event planned by either the Primary or Back-up Senior Event Manager on behalf of a firm other than the Offeror will be accepted.

For each event:

- The event start date must have been after July 1, 2008;
- The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);
- A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;
- The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;
- The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.

The Offeror must provide the following information for each of the six (6) event management project samples submitted:

- a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;
- b) Client;
- c) Client contact;
- d) Description of the event;

- e) Event start date;
- f) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);
- g) Number of delegates in attendance;
- h) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];
- i) Number of days the firm was on-site; and
- j) List of events management services provided.

*To better understand the event management project samples submitted for the mandatory criteria M.2, please complete the "M.2 Experience of Proposed Resources - Sample Fact Sheet", located in Appendix "1", for each of the six (6) samples.*

### **M.3 EXPERIENCE OF THE FIRM**

The Offeror must identify three (3) event management projects executed by the Offeror.

Two (2) of the events must have been managed by the Primary Senior Event Manager identified in M.2 and one (1) of the events must have been managed by the Back-up Senior Event Manager identified in M.2. The same events management project sample may not be used to demonstrate the experience of both the Primary and the Back-up Senior Event Manager. However, the Offeror may identify an events management project or projects which was/were previously identified under M.2 Experience of Proposed Resources. An event managed by either the Primary or Back-up Senior Event Manager on behalf of a firm other than the Offeror will not be accepted.

Two (2) of the events must have been located at international venues (ie. must have taken place outside of Canada). Of these two (2) international events, only one (1) may have been located within the United States of America.

For each event:

- The event start date must have been after July 1, 2008;
- The firm's assigned portion of the overall budget must have been at least \$85,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);
- A minimum of 40 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;
- The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates; and
- The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.

The Offeror must provide the following information for each of the three (3) event management project samples submitted:

- a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;
- b) Client;
- c) Client contact;

- d) Description of the event;
- e) Event start date;
- f) Event location;
- g) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);
- h) Number of delegates in attendance;
- i) Profile of delegates in attendance [i.e. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];
- j) Number of days the firm was on-site; and
- k) List of events management services provided.

The Offeror must provide a letter of reference for two (2) of the three (3) event management project samples submitted. One letter of reference must be for one of the two events managed by the Primary Senior Event Manager and one letter of reference must be for the event managed by the Back-up Senior Event Manager. Each letter of reference must be from the client for the event management project sample and be addressed to the Offeror. The Senior Event Manager who worked on the project must be named in the letter of reference. The letter of reference must indicate the client's satisfaction with the performance of the Offeror, including the client's satisfaction with the Offeror's ability to adhere to their quoted budget.

*To better understand the event management project samples submitted for the mandatory criteria M.3, please complete the "M.3 Experience of the Firm - Sample Fact Sheet", located in Appendix "2", for each of the three (3) samples.*

#### **M.4 LANGUAGE**

The Offeror must confirm that the firm is capable of providing services to the event delegates in both official languages (English and French). As such, the Offeror must include a duly signed and dated copy of the following Certification in the Technical Offer portion of the offer submission.

##### **Language Certification:**

The Offeror hereby certifies that its firm is capable of providing services to the event delegates in both official languages (English and French).

\_\_\_\_\_

*Signature*

\_\_\_\_\_

*Date*

**OFFERS NOT MEETING ALL OF THE MANDATORY REQUIREMENTS  
WILL BE GIVEN NO FURTHER CONSIDERATION.**

## **1.2 Financial Evaluation**

### **1.2.1 Evaluation of Price**

The price of the offer will be evaluated in Canadian dollars, Applicable Taxes extra, FOB destination, Canadian customs duties and excise taxes included.

### **1.2.2 Financial Evaluation Criteria**

Offers declared fully responsive according to the criteria identified in article 2 Basis of Selection below will be evaluated based on the prices proposed in the Financial Offers.

The Offeror must identify prices and rates in accordance with the Basis of Payment at Annex "B".

## **2. Basis of Selection**

### **2.1 Basis of Selection - Mandatory Technical Criteria Only**

An offer must comply with the requirements of the Request for Standing Offers and meet all mandatory technical evaluation criteria to be declared responsive. The responsive offer with the lowest Bid Evaluation Value (BEV) will be recommended for issuance of a standing offer.

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## PART 5 - CERTIFICATIONS

Offerors must provide the required certifications and related documentation to be issued a standing offer. Canada will declare an offer non-responsive if the required certifications and related documentation are not completed and submitted as requested.

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

### 1. Mandatory Certifications Required Precedent to Issuance of a Standing Offer

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

By submitting an offer, the Offeror certifies that the Offeror and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications - Offer of Standard Instructions 2006. The related documentation therein required will assist Canada in confirming that the certifications are true.

### 2. Additional Certifications Precedent to Issuance of a Standing Offer

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

#### 2.1 Federal Contractors Program - Certification

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including Applicable Taxes), make a formal commitment to implement employment equity. This is a condition precedent to the issuance of a standing offer. If the Offeror, or, if the Offeror 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 standing offer.

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

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

The Offeror or the member of the joint venture

- a) ( ) is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- 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 the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;
- d) ( ) is subject to FCP, and has a valid certificate number as follows: \_\_\_\_\_ (e.g. has not been declared an ineligible contractor by HRSDC).

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

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

**2.2 Canadian Content Certification**

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

**2.2.2.** This procurement is limited to Canadian services.

The Offeror certifies that:

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

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

**2.3 Status and Availability of Resources**

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work

resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer 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 Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability. Failure to comply with the request may result in the offer being declared non-responsive.

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

**2.4 Education and Experience**

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

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File No. - N° du dossier

cx004W8160-130009

Buyer ID - Id de l'acheteur

cx004

CCC No./N° CCC - FMS No/ N° VME

W8160-13-0009

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## **PART 6 - INSURANCE REQUIREMENTS**

### **1. Insurance Requirements**

The Offeror must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Offeror, if issued a standing offer as a result of the request for standing offer, can be insured in accordance with the Insurance Requirements specified in Annex "C".

If the information is not provided in the offer, the Standing Offer Authority will so inform the Offeror and provide the Offeror with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer Authority and meet the requirement within that time period will render the offer non-responsive.

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## PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

### A. STANDING OFFER

#### 1. Offer

1.1 The Offeror offers to perform the Work in accordance with the Statement of Work at Annex "A".

#### 2. Security Requirement

There is no security requirement applicable to this Standing Offer.

#### 3. Standard Clauses and Conditions

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

##### 3.1 General Conditions

2005 (2012-11-19) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

##### 3.2 Standing Offers Reporting

The Offeror must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Standing Offer. This data must include all purchases, including those paid for by a Government of Canada Acquisition Card.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex "D". If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Offeror must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Standing Offer Authority.

The quarterly reporting periods are defined as follows:

1st quarter: April 1 to June 30;  
2nd quarter: July 1 to September 30;  
3rd quarter: October 1 to December 31;  
4th quarter: January 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than 15 calendar days after the end of the reporting period.

#### 4. Term of Standing Offer

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#### **4.1 Period of the Standing Offer**

The period for making call-ups against the Standing Offer is from August 1, 2013 to July 31, 2014.

#### **4.2 Extension of Standing Offer**

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for two additional one-year periods, from August 1, 2014 to July 31, 2015 and from August 1, 2015 to July 31, 2016 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority 30 days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

### **5. Authorities**

#### **5.1 Standing Offer Authority**

The Standing Offer Authority is:

Rochelle York  
Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Communications Procurement Directorate  
360 Albert St., 12th Floor, #3  
Ottawa, ON K1A 0S5

Telephone: 613-998-8408  
Facsimile: 613-993-2581  
E-mail address: rochelle.york@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable.

#### **5.2 DND Call-up Authority**

The DND Call-up Authority will be identified in the resulting Standing Offer.

The DND Call-up Authority is responsible for awarding Call-ups in accordance with the Call-up procedures in the Standing Offer. Upon the making of a call-up, as the Contracting Authority, he/she is responsible for any contractual issues relating to individual call-ups made against the Standing Offer.

#### **5.3 Project Authority**

The Project Authority is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

#### 5.4 Offeror's Representative

The Offeror's Representative for the Standing Offer will be identified in the resulting Standing Offer.

##### 5.4.1 Qualified Resources

The resources qualified to perform work under the Standing Offer are (*To be inserted by the Standing Offer Authority prior to Standing Offer award.*):

|                      | Resources |         |
|----------------------|-----------|---------|
|                      | Primary   | Back-up |
| Senior Event Manager |           |         |

#### 6. Proactive Disclosure of Contracts with Former Public Servants (if applicable)

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Standing Offer Holder has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

#### 7. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is the Department of National Defence (DND) - Canadian Forces College (CFC).

#### 8. Call-up Procedures

The following procedures will apply to issue Call-ups Against the Standing Offer:

- a) The DND Call-up Authority will provide the Standing Offer Holder with a preliminary Statement of Work prior to each event.
- b) The Standing Offer Holder will submit an Estimated Cost Proposal within five (5) days following receipt of the Statement of Work.
- c) When a confirmed, finalized Statement of Work has been established in conjunction with the Project Authority, the Standing Offer Holder will submit a Final Cost Proposal, including detailed estimates for level of effort, resources required, travel details, and on-site work schedules for resources. The Final Cost Proposal will be based on the unit prices specified in Annex "B" Basis of Payment and is subject to the approval of the Project Authority and the DND Call-up Authority.
- d) The Standing Offer Holder will be authorized to proceed with the Work by the DND Call-up Authority or his/her authorized representative through a completed and signed PWGSC-TPSGC 924, Call-up Against a Standing Offer. The Standing Offer Holder must not undertake any of the specified work unless and until a Call-up is issued. The estimated cost stated in the Call-up must not be exceeded without the specific written authorization of the DND Call-up Authority. The estimated cost stated in

the Call-up must not exceed the Limitation of Call-ups identified in article 10 below without the express written permission of the PWGSC Standing Offer Authority.

## 9. Call-up Instrument

The Work will be authorized or confirmed by the Identified User using form PWGSC-TPSGC 942, Call-up Against a Standing Offer, or an electronic version.

## 10. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed **\$500,000.00** (Applicable Taxes included).

## 11. Financial Limitation

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of **\$1,495,000.00** (Applicable Taxes excluded) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or four (4) months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

## 12. 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 call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2005 (2012-11-19), General Conditions - Standing Offers - Goods or Services;
- d) the general conditions 2010B (2013-04-25), General Conditions - Professional Services (Medium Complexity);
- e) Annex "A", Statement of Work;
- f) Annex "B", Basis of Payment;
- g) Annex "C", Insurance Requirements;
- h) Annex "D", Standing Offer Reporting Requirements;
- i) the Offeror's offer dated **(TBD)**.

## 13. Certifications

### 13.1 Compliance

Compliance with the certifications and related documentation provided by the Offeror is a condition of authorization of the Standing Offer and subject to verification by Canada during the

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term of the Standing Offer and of any resulting contract that would continue beyond the period of the Standing Offer. In the event that the Offeror does not comply with any certification, provide the related documentation or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

### **13.2 SACC Manual Clauses**

SACC Manual Clause M3020C (2010-01-11) Status and Availability of Resources  
SACC Manual Clause M3060C (2008-05-12) Canadian Content Certification

## **14. Applicable Laws**

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

## **15. 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. RESULTING CONTRACT CLAUSES**

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

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

The Contractor must perform the Work described in the call-up against the Standing Offer.

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

#### **2.1 General Conditions**

2010B (2013-04-25), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

Section 15 Interest on Overdue Accounts, of 2010B (2013-04-25), General Conditions - Professional Services (Medium Complexity), will not apply to payments made by credit cards.

### **3. Term of Contract**

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

The Work must be completed in accordance with the call-up against the Standing Offer.

#### 4. Proactive Disclosure of Contracts with Former Public Servants (if applicable)

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

#### 5. Payment

##### 5.1 Basis of Payment

The Contractor will be paid in accordance with the Basis of Payment at Annex "B", for Work performed pursuant to the Contract and subject to acceptance by the Project Authority.

##### 5.1.1 Basis of Payment - Professional Services

The firm fixed hourly 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 Applicable Taxes.

The Contractor is subject to the Applicable Laws as outlined in article 14 of the Standing Offer. As such, the Contractor is responsible for ensuring adherence to these Laws, including any applicable Labour Laws. The firm fixed all-inclusive hourly rates charged by the Contractor reflect this responsibility and Canada will not be subject to additional charges not expressly laid out herein.

There is no provision for overtime under this Contract.

##### 5.1.1.1 Firm Hourly Rates - Professional Services

For the Professional Services associated with the Work described in the Statement of Work at Annex "A" in the Call-up and according to Table 1 in Annex "B" Basis of Payment:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid firm hourly rates for a cost of **\$ (TBD)**. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

##### 5.1.2 Basis of Payment - Direct and Subcontracted Expenses

##### 5.1.2.1 Direct Expenses

Direct expenses include any expenses directly incurred by the Contractor 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; audio/video equipment rental; simultaneous interpretation

equipment rental; commercial transportation; 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 prices for professional services identified herein, and will not be permitted as direct expenses under the Contract.

Direct expenses will be charged at net cost with a **(TBD)% mark-up** (as per Annex "B" Basis of Payment) to cover carrying charges.

#### 5.1.2.2 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 Contractor 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 a **(TBD)% mark-up** (as per Annex "B" Basis of Payment). Invoices from the Contractor to Canada must be accompanied by copies of invoices from the subcontractors. Invoices from second-tier subcontractors (the subcontractors of the Contractor's subcontractors) are not required under the Contract.

For each subcontracted service over \$25,000 (taxes included) the Contractor will obtain competitive bids from no fewer than three outside suppliers. The Contractor must provide to the DND Call-up 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.

#### 5.1.2.3 Limitation of Expenditure - Direct and Subcontracted Expenses

For the Direct and Subcontracted Expenses associated with the Work described in the Statement of Work at Annex "A" in the Call-up, including any applicable Direct and Subcontracted Expenses Mark-up as per Table 2 in Annex "B" Basis of Payment:

1. Canada's total liability to the Contractor for the Direct and Subcontracted Expenses under this Contract will not exceed **\$ (TBD)**. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the specifications, will be authorized or paid to the Contractor unless such design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority prior to their incorporation into the Work. The Contractor will not be obliged to perform any work or provide any service that would cause the total liability of Canada to be exceeded without the prior written approval of the Contracting Authority. The Contractor will notify the Contracting Authority in writing as to the adequacy of this sum when:

- a) it is 75 percent committed, or
- b) four (4) months prior to the Contract expiry date, or
- c) if the Contractor considers that the funds provided are inadequate for the completion of the Work, whichever comes first.

3. In the event that the notification refers to inadequate funds, the Contractor will provide to the Contracting Authority, in writing, an estimate for the additional funds required. Provision of such notification and estimate for the additional funds does not increase Canada's liability.

### 5.1.3 Basis of Payment - Travel and Living Expenses

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive (<http://www.njc-cnm.gc.ca/directive/index.php?did=10&lang=eng>), 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 Contractor may sign a Declaration in order to receive reimbursement.

Note: The Contractor is not an employee of Canada and as such, is not eligible for any Government of Canada employee benefits as they pertain to the National Joint Council Travel Directive, or otherwise. This includes any provisions pertaining to "travel status" as set out in the Directive which are not expressly permitted herein.

#### 5.1.3.1 Ceiling Price - Travel and Living Expenses (Contractor)

For the Contractor's Travel and Living Expenses associated with the Work described in the Statement of Work at Annex "A" in the Call-up:

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, to a ceiling price of **\$ (TBD)**. Customs duties are included and Applicable Taxes are extra.

The ceiling price is subject to downward adjustment so as not to exceed the actual costs reasonably incurred in the performance of the Work and computed in accordance with the Basis of Payment.

## 5.2 Hospitality

All hospitality must have the prior written authorization of the Project Authority and must be included in the Contractor's quote for the specific requirement. It is the Contractor'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 Directive on the Management of Expenditures on Travel, Hospitality and Conferences and the National Joint Council Travel Directive. It is the Project Authority's responsibility to adhere to all applicable internal approval procedures as they pertain to Hospitality.

The Treasury Board Directive on the Management of Expenditures on Travel, Hospitality and Conferences is available at: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=19855&section=text>.

The National Joint Council Travel Directive is available at:  
<http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>.

### 5.3 Multiple Payments

Canada will pay the Contractor upon completion and delivery of Work in accordance with the payment provisions of the Contract if:

- i. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- ii. all such documents have been verified by Canada;
- iii. the Work delivered has been accepted by Canada.

### 5.4 SACC Manual Clauses

SACC Manual clause A9117C (2007-11-30) T1204 - Direct Request by Customer Department  
SACC Manual Clause C0705C (2010-01-11) Discretionary Audit

### 5.5 Payment by Credit Card

The following credit cards are accepted: TBD and TBD.

## 6. Invoicing Instructions

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

For the purposes of invoice submission, "work" is defined as professional services rendered, direct or subcontracted expenses (either in whole or in part) incurred, and/or travel and living expenses incurred.

Each invoice must be supported by a copy of the invoices, receipts, and/or vouchers for all direct expenses, subcontracted expenses, and all travel and living expenses;

2. Invoices must be distributed as follows:

- i. The original and one (1) copy must be forwarded to the following address for certification and payment.

*The name and contact information will be provided in the resulting Standing Offer.*

- ii. One (1) electronic copy must be forwarded to the Standing Offer Authority identified under article 5.1 at the same time the invoice is forwarded for certification and payment.

## 7. Insurance Requirements

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The Contractor must comply with the insurance requirements specified in Annex "C" . The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

## **8. 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 call-up against the Standing Offer, including annexes;
- b) the articles of the Standing Offer;
- c) the general conditions 2010B (2013-04-25) General Conditions - Services (Medium Complexity);
- d) Annex A, Statement of Work;
- e) Annex B, Basis of Payment; and
- f) the Standing Offer Holder's project estimate dated   **TBD**  .

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## **ANNEX "A"**

### **STATEMENT OF WORK**

#### **EVENT MANAGEMENT SERVICES — CANADIAN FORCES COLLEGE**

#### **A.1 BACKGROUND**

The Canadian Forces College (CFC) prepares senior military and civilian leaders to meet the complex security challenges of the future through the development and delivery of educational curriculum in the form of annual programmes and single-issue symposiums. Major CFC programmes include:

- National Security Programme (NSP) — a 10-month residential programme for approximately 30 colonels/naval captains from the Canadian Forces (CF) and foreign militaries, as well as Government of Canada (GOC) executives;
- Joint Command and Staff Programme (JCSP) — a 10-month residential programme for approximately 140 majors/lieutenant-commanders from the CF and foreign militaries;
- Executive Leaders Programme (ELP) — a one-week seminar for approximately 20 CF General Officers/Flag Officers, Chief Warrant Officers/Chief Petty Officers and invited GOC executives; and
- Canadian Security Studies Programme (CSSP) — a two-week seminar for approximately 90 senior military, public service, international and private sector leaders.

#### **A.2 PURPOSE**

CFC requires support to plan, arrange and conduct events as part of its educational mandate, on an as and when requested basis. Events to be held at CFC include short programmes, symposiums, operational exercises and convocation ceremonies. Occasionally, these events are required to be held at other sites in Toronto or elsewhere in Canada. Events planned to be held outside CFC include operational exercises and programme trips, in the form of Experiential Learning Visits (ELVs), to Canadian and international cities to visit military, government, multinational and commercial institutions, facilities and think tanks.

#### **A.3 SCOPE OF WORK**

Tasks involved in this requirement are to provide services on an as and when requested basis that support the planning and conduct of specified CFC events. These services may include, but are not limited to, the tasks listed in the following sub-sections.

Upon award of a Call-up Against the Standing Offer, the Standing Offer Holder may be required to:

##### **A.3.1 General Activities**

- a) Clarify the aim, objectives, schedule, locations, budget and resource limitations of the event;
- b) Participate in frequent (or as required) teleconferencing coordination meetings to brief on progress and receive directions;
- c) Prepare and deliver options analyses in support of the planning of the event;
- d) Research and negotiate (if applicable) best rates and optimal inclusions for event services;

- e) Prepare and deliver rated and ranked bids for evaluation and selection by the applicable CFC Project Authority;
- f) Conduct contingency planning and risk management;
- g) Deliver event services;
- h) Manage protocols for dignitaries for inside and outside Canada according to CFC policies;
- i) Budget and manage contracts and financial aspects for services;
- j) Pay service providers for services rendered, except for those specified to be paid separately, such as for other CFC contractors and other third party or National Defence;
- k) Submit to the CFC Project Authority an After Action Report of the event, when requested, for the purpose of improving the conduct of future events of similar nature.

### **A.3.2 Event Services**

- a) Researching and coordinating transportation for participants and shipping of material;
- b) Researching and coordinating accommodations for delegates and other personnel, if required;
- c) Researching and coordinating rental of space location (including identifying and negotiating with selected sites and facilities authorities);
- d) Planning and managing function room and audio-visual requirements;
- e) Managing hospitality, food and beverage in accordance to the Directive on the Management of Expenditures on Travel, Hospitality and Conferences and the National Joint Council Travel Directive;
- f) Selecting and making provisions for speakers according to CFC policies;
- g) Coordinating translation and simultaneous interpretation from a specified language to English and/or French;
- h) Printing, reproduction, distribution and shipping of documents and materials; and
- i) Other general administration duties.

### **A.3.3 Other Activities and/or Services**

- a) Event marketing and promotion;
- b) Assembling and distribution of event kits such as, but not limited to symposia;
- c) Floor-space management;
- d) Managing exhibit and booth set-up;
- e) Staff and volunteer hiring and training;
- f) Establishing registration procedures and managing the registration process whether it be automated or paper based;
- g) Arranging and providing for on-site security during the event and after hours;
- h) Audio-visual, photographic and secretarial recording;
- i) Production of proceedings (i.e. itinerary and agenda); and
- j) Maintaining logistical control of events.

## **A.4 LANGUAGE REQUIREMENTS**

The primary language of work will be English. However, the Standing Offer Holder must be able to communicate with event participants in either English or French.

## **A.5 TRAVEL**

- a) The Standing Offer Holder will be required to attend a start-up meeting at CFC within two weeks of award of any resulting Standing Offer;

- 
- b) The Standing Offer Holder will travel to CFC at least twice annually for consolidated planning and progress review meetings with applicable CFC Planners;
  - c) The Standing Offer Holder will support each outside Toronto event either by sending a representative to travel with each group or by maintaining a 24-hour telephone and e-mail response capability, as tasked by the Project Authority. *\*(For planning purposes, this support requirement is shown for upcoming major events at Appendix 1 to this SOW.);*
  - d) The Standing Offer Holder may be tasked on short notice to travel to CFC, an event location or elsewhere to support the planning or conduct of an event; and
  - e) The Standing Offer Holder may be required, especially during the conduct of ELVs, to work at all hours, often on a continuous basis, and to travel with little notice, for extended periods of time.

#### **A.6 WORK LOCATION**

The Standing Offer Holder may conduct the majority of preparation and planning work for events from the Standing Offer Holder's business location.

#### **A.7 ANTICIPATED LIST OF EVENTS**

The list of anticipated events for the 2013-2014 academic year, along with the associated administrative Event Planner activities and estimated budget for each is attached as Appendix "1" to this Statement of Work. Appendix "1" is for planning purposes only and CFC has the right to delete/add/modify events as required. The Standing Offer Holder must not undertake any work unless and until a Call-up is issued by the Call-up Authority.

The list of anticipated events for subsequent academic years is expected to be similar in terms of number, location, scope and budget.

**APPENDIX "1" TO ANNEX "A" STATEMENT OF WORK - ANTICIPATED LIST OF EVENTS  
CFC ACADEMIC YEAR 2013-2014**

| # | EVENT  | DATE     | ACTIVITIES  | SUPPORT                 | BUDGET <sup>(1)</sup> |
|---|--|----------|---|-------------------------|-----------------------|
| 1 | JCSP<br>Canadian<br>Component<br>ELV<br><br>~ 150 pers<br><br>~ 5 days | Oct 2013 | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Baggage truck rental</li> <li>• Service air to Ottawa</li> <li>• Bus in Ottawa</li> <li>• Hotel(s) and breakfast in Ottawa</li> <li>• Bus from Ottawa to CFB Petawawa to Pembroke</li> <li>• Hotel(s) and breakfast in Pembroke</li> <li>• Bus from Pembroke to Petawawa airport</li> <li>• Service air to Halifax</li> <li>• Bus from Halifax airport to Halifax</li> <li>• Hotel(s) and breakfast in Halifax</li> <li>• Bus in Halifax</li> <li>• Bus from Halifax hotel to airport</li> <li>• Service air to Toronto Pearson International Airport</li> <li>• Bus from airport to CFC</li> </ul> | By telephone/<br>e-mail | \$175,000.00          |
| 2 | NSP Ottawa<br>ELV<br><br>~ 40 pers<br><br>~ 5 days                     | Oct 2013 | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Air to Ottawa</li> <li>• Hotel and meeting room in Ottawa</li> <li>• Meals - Breakfasts and Lunches</li> <li>• Air back to Toronto</li> <li>• Bus from airport to CFC</li> </ul>  | By telephone/<br>e-mail | \$90,000.00           |

|   |   |                 |  |                         |              |
|---|---|-----------------|--|-------------------------|--------------|
| 3 | NSP US/UN<br>ELV<br><br>~ 40 pers<br><br>~ 14 days                  | Jan/Feb<br>2014 | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Air to NYC</li> <li>• Train between NYC/Washington, DC</li> <li>• Buses at both destinations</li> <li>• Hotels and meeting rooms at both destinations</li> <li>• Meals - Breakfasts and Lunches</li> <li>• Air back to Toronto</li> <li>• Bus from airport to CFC</li> </ul> | By telephone/<br>e-mail | \$220,000.00 |
| 4 | NSP Exercise<br>Strategic<br>Power<br><br>~ 40 pers<br><br>~ 5 days | Mar 2014        | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Air to Ottawa</li> <li>• Hotel and meeting room in Ottawa</li> <li>• Meals - Breakfasts and Lunches</li> <li>• Air back to Toronto</li> <li>• Bus from airport to CFC</li> </ul>   | By telephone/<br>e-mail | \$90,000.00  |
| 5 | Leavenworth<br>Exchange<br><br>~ 14 pers<br><br>~ 5 days            | Mar 2014        | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Air to Fort Leavenworth, Kansas</li> <li>• Hotel in Fort Leavenworth</li> <li>• Arrange rental cars</li> <li>• Air back to Toronto</li> <li>• Bus from airport to CFC</li> </ul>   | By telephone/<br>e-mail | \$20,000.00  |

|   |   |          |   |  |              |
|---|---|----------|---|--|--------------|
| 6 | NSP<br>International<br>ELV<br><br>~ 40 pers<br>divided into<br>two groups<br><br>~ 14 days | Apr 2014 | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Air for first group to International destination A (TBD)<sup>(2)</sup></li> <li>• Air for second group to International destination B (TBD)<sup>(2)</sup></li> <li>• Air for first group to International destination C (TBD)<sup>(2)</sup></li> <li>• Air for second group to International destination D (TBD)<sup>(2)</sup></li> <li>• Air for both groups to merge at International destination E (TBC)<sup>(2)</sup></li> <li>• Hotels and meeting rooms at all destinations</li> <li>• Buses at all destinations</li> <li>• Meals - Breakfasts and Lunches</li> <li>• Air for whole group back to Toronto</li> <li>• Bus from airport to CFC</li> </ul> | 2 x Contractor representatives travel - 1 x representative with each group | \$500,000.00 |
| 7 | JCSP Arctic<br>ELV<br><br>~ 150 pers<br><br>~ 6 days  | May 2014 | <ul style="list-style-type: none"> <li>• Bus from CFC to Toronto Pearson International Airport</li> <li>• Service air to Winnipeg</li> <li>• Buses and luggage trucks in Winnipeg</li> <li>• Hotel(s) in Winnipeg (1 night)</li> <li>• Service air to Yellowknife</li> <li>• Buses and luggage trucks in Yellowknife</li> <li>• Hotel(s) and meals (breakfast, lunch and dinner) in Yellowknife (2 nights)</li> <li>• Service air to Resolute Bay</li> <li>• Buses and luggage trucks in Resolute Bay</li> <li>• Hotel(s) and meals (breakfast, lunch and dinner) in Resolute Bay (1 night)</li> <li>• Service air back to Toronto</li> <li>• Bus from airport to CFC</li> </ul>  | By telephone/<br>e-mail  | \$175,000.00 |

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|   |  |          |  |                         |             |
|---|--|----------|--|-------------------------|-------------|
| 8 | NSP Exercise Strategic Play<br>~ 40 pers<br>~ 5 days | Jun 2014 | <ul style="list-style-type: none"><li>• Bus from CFC to Toronto Pearson International Airport</li><li>• Air to Ottawa</li><li>• Hotels and meeting rooms in Ottawa</li><li>• Meals - Lunches</li><li>• Air back to Toronto</li><li>• Bus from airport to CFC</li></ul> | By telephone/<br>e-mail | \$85,000.00 |
|---|--|----------|--|-------------------------|-------------|

Notes:

1. The budgeted amounts are estimates only for scoping and planning purposes and are subject to change.

2. The NSP International ELV is intended to focus on a single international region, such as Europe, East Asia or South America. It is likely that the region for the coming academic year will be the Eurasian Arctic nations, with destinations to some or all of Russia, Finland, Sweden, Norway and Denmark. These destinations are suggested only for scoping and planning purposes and are subject to change.

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## ANNEX "B" BASIS OF PAYMENT

*The Offeror must quote all prices in Canadian dollars, Applicable Taxes extra, FOB destination. The Offeror may not propose any options, provide any optional pricing, or stipulate any conditions. Any Offeror that includes any options or conditions whatsoever will be deemed non-responsive.*

**Table 1: Firm Hourly Rates - Professional Services:**

*The Offeror must quote firm fixed all-inclusive hourly rates for Professional Services in accordance with article 5.1.1 Basis of Payment - Professional Services in the Resulting Contract Clauses. These firm fixed all-inclusive hourly rates will form part of any resulting Call-up. The Offeror must also quote a firm fixed all-inclusive level of effort, in hours, by resource, for Event #1 (JCSP Canadian Component ELV). The Total Professional Fees for Event #1 will form part of the Bid Evaluation Value (BEV) and will form part of any resulting Call-up for Event #1.*

| Resource   | Firm Fixed All-Inclusive Level of Effort for Event #1 (JCSP Canadian Component ELV) for Evaluation Purposes and for the Purposes of any Resulting Call-up for Event #1 | Firm All-Inclusive Hourly Rates for Professional Services |
|--|--|---|
| Senior Event Manager   |  |   |
| Event Manager  |  |   |
| Event Coordinator  |  |   |
| Financial Manager  |  |   |
| Event Assistant  |  |   |
| <b>Total Professional Fees (excluding Applicable Taxes) for Event #1 (JCSP Canadian Component ELV)</b> |  | <b>\$0.00</b>   |

**Table 2: Limitation of Expenditure - Direct and Subcontracted Expenses:**

*The Offeror must quote a firm all-inclusive Mark-up on Direct and Subcontracted Expenses as a percentage in accordance with article 5.1.2 Basis of Payment - Direct and Subcontracted Expenses in the Resulting Contract Clauses. An estimate for the direct and subcontracted expenses for Event #1 (JCSP Canadian Component ELV) has been provided below which is in accordance with the Statement of Work at Annex "A". The Firm All-Inclusive Direct and Subcontracted Expenses Mark-up will form part of any resulting Call-up. The Total Estimated Direct and Subcontracted Expenses for Event #1 will form part of the Bid Evaluation Value (BEV) and will form part of any resulting Call-up for Event #1.*

|  |                     |
|--|---------------------|
| <b>Total Estimated Direct and Subcontracted Expenses for Event #1 (JCSP Canadian Component ELV)</b>                              | <b>\$115,000.00</b> |
| <b>Firm All-Inclusive Direct &amp; Subcontracted Expenses Mark-up</b>  | <b>%</b>            |
| <b>Total Estimated Direct and Subcontracted Expenses (excluding Applicable Taxes) for Event #1 (JCSP Canadian Component ELV)</b> | <b>#VALUE!</b>      |

**Table 3: Ceiling Price - Travel and Living (Contractor):**

*The Offeror must quote a total price for its travel and living expenses in accordance with the Work outlined in the Statement of Work at Annex "A", and in accordance with article 6.1.3 Basis of Payment - Travel and Living Expenses in the Resulting Contract Clauses for Event #1 (JCSP Canadian Component ELV) only. The total price quoted will form part of the Bid Evaluation Value (BEV) and will form part of any resulting Call-up for Event #1. Note: this is the travel and living expenses for the Offeror only - not any travel and living expenses for event delegates, which is included in the Total Estimated Direct and Subcontracted Expenses in Table 2 above.*

|   |  |
|---|--|
| <b>Total Travel and Living Expenses (excluding Applicable Taxes) for Event #1 (JCSP Canadian Component ELV)</b> |  |
|---|--|

|   |                |
|---|----------------|
| <b>TOTAL ALL-INCLUSIVE BID EVALUATION VALUE (BEV) FOR EVALUATION PURPOSES AND FOR THE PURPOSES OF ANY RESULTING CALL-UP FOR EVENT #1* (TOTAL FROM TABLES 1 - 3)</b> | <b>#VALUE!</b> |
|---|----------------|

*\*NOTE: The BEV is calculated for evaluation purposes and will also form the firm all-inclusive Basis of Payment for any resulting Call-up Against the Standing Offer for Event #1 (JCSP Canadian Component ELV). The firm all-inclusive hourly rates for professional services and the Firm All-Inclusive Direct and Subcontracted Expenses Mark-up quoted by the Offeror in Tables 1 and 2 will also apply to any resulting Call-up as indicated herein.*

*An electronic version of this Annex is available by contacting the Standing Offer Authority named in Part 7, article 5.1.*

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## ANNEX "C" INSURANCE REQUIREMENTS

### C.1 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.
  - 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.

## C.2 Errors and Omissions Liability Insurance

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional 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 \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.
2. 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.
3. The following endorsement must be included:

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Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.



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**ANNEX "E"  
EVALUATION GRIDS**

| EVALUATION SUMMARY  |       |
|---|-------|
| MANDATORY REQUIREMENTS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET |       |
| Mandatories Checked by:   | Date: |
| Overall Comments:   |       |
|   |       |
|   |       |
|   |       |
|   |       |
|   |       |

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

| Evaluation Criteria   | Met | Not met |
|---|-----|---------|
| The offer is signed and offer submission requirements of Standard Instructions 2006 are met.  |     |         |
| The certifications in Part 5 - Subsection 1.1 - Code of Conduct and Certifications - Related documentation have been provided (either upon or following offer submission).                    |     |         |
| The certifications in Part 5 - Subsection 2 - Additional Certifications Precedent to Issuance of a Standing Offer have been completed and signed (either upon or following offer submission). |     |         |
| Comments:   |     |         |
|   |     |         |
|   |     |         |

| Evaluation Criteria    | Met | Not met |
|------------------------|-----|---------|
| M.1 FINANCIAL PROPOSAL |     |         |

|  |  |  |
|--|--|--|
| The Offeror must provide costing information strictly in accordance with Annex "B" Basis of Payment. |  |  |
| <b>Comments:</b>   |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| Evaluation Criteria  | Met | Not met |
|--|-----|---------|
| <b>M.2 EXPERIENCE OF PROPOSED RESOURCES</b>  |     |         |
| The Offeror must identify two (2) resources, a Primary Senior Event Manager and a Back-up Senior Event Manager.  |     |         |
| The Offeror must identify three (3) event management project samples for <u>each</u> of the Primary Senior Event Manager and the Back-up Senior Event Manager. The same event management project sample <u>may not</u> be used to demonstrate the experience of both the Primary and the Back-up Senior Event Manager. An event planned by either the Primary or Back-up Senior Event Manager on behalf of a firm other than the Offeror will be accepted.   |     |         |
| <p><b>Event Management Project Sample #1 - Primary Senior Event Manager:</b></p> <ul style="list-style-type: none"> <li>a) The event start date must have been after July 1, 2008;</li> <li>b) The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>c) A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</li> <li>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ul> <p>The Offeror must provide the following information:</p> <ul style="list-style-type: none"> <li>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</li> <li>b) Client;</li> <li>c) Client contact;</li> <li>d) Description of the event;</li> <li>e) Event start date;</li> <li>f) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>g) Number of delegates in attendance;</li> </ul> |     |         |

|  |  |  |
|--|--|--|
| <p>h) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</p> <p>i) Number of days the firm was on-site; and</p> <p>j) List of events management services provided.</p>  |  |  |
| <p><b>Event Management Project Sample #2 - Primary Senior Event Manager:</b></p> <p>a) The event start date must have been after July 1, 2008;</p> <p>b) The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>c) A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</p> <p>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</p> <p>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</p> <p>The Offeror must provide the following information:</p> <p>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</p> <p>b) Client;</p> <p>c) Client contact;</p> <p>d) Description of the event;</p> <p>e) Event start date;</p> <p>f) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>g) Number of delegates in attendance;</p> <p>h) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</p> <p>i) Number of days the firm was on-site; and</p> <p>j) List of events management services provided.</p> |  |  |
| <p><b>Event Management Project Sample #3 - Primary Senior Event Manager:</b></p> <p>a) The event start date must have been after July 1, 2008;</p> <p>b) The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>c) A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</p> <p>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</p>  |  |  |

|   |  |  |
|---|--|--|
| <p>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</p> <p>The Offeror must provide the following information:</p> <ol style="list-style-type: none"> <li>Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</li> <li>Client;</li> <li>Client contact;</li> <li>Description of the event;</li> <li>Event start date;</li> <li>Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>Number of delegates in attendance;</li> <li>Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</li> <li>Number of days the firm was on-site; and</li> <li>List of events management services provided.</li> </ol>   |  |  |
| <p><u>Event Management Project Sample #4 - Back-up Senior Event Manager:</u></p> <ol style="list-style-type: none"> <li>The event start date must have been after July 1, 2008;</li> <li>The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</li> <li>The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ol> <p>The Offeror must provide the following information:</p> <ol style="list-style-type: none"> <li>Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</li> <li>Client;</li> <li>Client contact;</li> <li>Description of the event;</li> <li>Event start date;</li> <li>Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>Number of delegates in attendance;</li> <li>Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</li> <li>Number of days the firm was on-site; and</li> <li>List of events management services provided.</li> </ol> |  |  |

|  |  |  |
|--|--|--|
| <p><b>Event Management Project Sample #5 - Back-up Senior Event Manager:</b></p> <ul style="list-style-type: none"> <li>a) The event start date must have been after July 1, 2008;</li> <li>b) The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>c) A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</li> <li>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ul> <p>The Offeror must provide the following information:</p> <ul style="list-style-type: none"> <li>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</li> <li>b) Client;</li> <li>c) Client contact;</li> <li>d) Description of the event;</li> <li>e) Event start date;</li> <li>f) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>g) Number of delegates in attendance;</li> <li>h) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</li> <li>i) Number of days the firm was on-site; and</li> <li>j) List of events management services provided.</li> </ul> |  |  |
| <p><b>Event Management Project Sample #6 -Back-up Senior Event Manager:</b></p> <ul style="list-style-type: none"> <li>a) The event start date must have been after July 1, 2008;</li> <li>b) The firm's assigned portion of the overall budget must have been at least \$200,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>c) A minimum of 100 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates;</li> <li>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ul> <p>The Offeror must provide the following information:</p>   |  |  |

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| <p>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</p> <p>b) Client;</p> <p>c) Client contact;</p> <p>d) Description of the event;</p> <p>e) Event start date;</p> <p>f) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>g) Number of delegates in attendance;</p> <p>h) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</p> <p>i) Number of days the firm was on-site; and</p> <p>j) List of events management services provided.</p> |  |  |
| <b>Comments:</b>  |  |  |
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| Evaluation Criteria   | Met | Not met |
|---|-----|---------|
| <b>M.3 EXPERIENCE OF THE FIRM</b>   |     |         |
| The Offeror must identify three (3) events management projects executed by the Offeror.   |     |         |
| Two (2) of the events must have been managed by the Primary Senior Event Manager identified in M.2 and one (1) of the events must have been managed by the Back-up Senior Event Manager identified in M.2. The same events management project sample <u>may not</u> be used to demonstrate the experience of both the Primary and the Back-up Senior Event Manager. However, the Offeror may identify an events management project or projects which was/were previously identified under M.2 Experience of Proposed Resources. An event managed by either the Primary or Back-up Senior Event Manager on behalf of a firm other than the Offeror <u>will not</u> be accepted.  |     |         |
| Two (2) of the events must have been located at international venues (ie. must have taken place outside of Canada). Of these two (2) international events, only one (1) may have been located within the United States of America.  |     |         |
| The Offeror must provide a letter of reference for two (2) of the three (3) event management project samples submitted. One letter of reference must be for one of the two events managed by the Primary Senior Event Manager and one letter of reference must be for the event managed by the Back-up Senior Event Manager. Each letter of reference must be from the client for the event management project sample and be addressed to the Offeror. The Senior Event Manager who worked on the project must be named in the letter of reference. The letter of reference must indicate the client's satisfaction with the performance of the Offeror, including the client's satisfaction with the Offeror's ability to adhere to their quoted budget. |     |         |

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| <p><u>Event Management Project Sample #1:</u></p> <ul style="list-style-type: none"> <li>a) The event start date must have been after July 1, 2008;</li> <li>b) The firm's assigned portion of the overall budget must have been at least \$85,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>c) A minimum of 40 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates; and</li> <li>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ul> <p>The Offeror must provide:</p> <ul style="list-style-type: none"> <li>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</li> <li>b) Client;</li> <li>c) Client contact;</li> <li>d) Description of the event;</li> <li>e) Event start date;</li> <li>f) Event location;</li> <li>g) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>h) Number of delegates in attendance;</li> <li>i) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</li> <li>j) Number of days the firm was on-site; and</li> <li>k) List of events management services provided.</li> </ul> |  |  |
| <p><u>Event Management Project Sample #2:</u></p> <ul style="list-style-type: none"> <li>a) The event start date must have been after July 1, 2008;</li> <li>b) The firm's assigned portion of the overall budget must have been at least \$85,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li> <li>c) A minimum of 40 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</li> <li>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates; and</li> <li>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</li> </ul> <p>The Offeror must provide:</p>  |  |  |

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| <p>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</p> <p>b) Client;</p> <p>c) Client contact;</p> <p>d) Description of the event;</p> <p>e) Event start date;</p> <p>f) Event location;</p> <p>g) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>h) Number of delegates in attendance;</p> <p>i) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</p> <p>j) Number of days the firm was on-site; and</p> <p>k) List of events management services provided.</p>   |  |  |
| <p><b>Event Management Project Sample #3:</b></p> <p>a) The event start date must have been after July 1, 2008;</p> <p>b) The firm's assigned portion of the overall budget must have been at least \$85,000 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>c) A minimum of 40 delegates, including delegates having at least (1) of the following profiles: a) senior ranking (Major/Lieutenant-Commander or higher) domestic and foreign military officials; b) Government of Canada executives; or c) domestic or foreign private sector executives (Senior Management or higher), must have been in attendance;</p> <p>d) The firm must have been on-site for three (3) days or more. "On-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates; and</p> <p>e) The provision of all of the following event management services must have been required: accommodations, hospitality, and transportation.</p> <p>The Offeror must provide:</p> <p>a) Name of the proposed Primary or Back-up Senior Event Manager responsible for managing the event;</p> <p>b) Client;</p> <p>c) Client contact;</p> <p>d) Description of the event;</p> <p>e) Event start date;</p> <p>f) Event location;</p> <p>g) Firm's assigned portion of the overall budget (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</p> <p>h) Number of delegates in attendance;</p> <p>i) Profile of delegates in attendance [ie. the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates];</p> <p>j) Number of days the firm was on-site; and</p> <p>k) List of events management services provided.</p> |  |  |
| <p><b>Comments:</b></p>   |  |  |

Solicitation No. - N° de l'invitation

W8160-130009/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

cx004

Client Ref. No. - N° de réf. du client

W8160-13-0009

File No. - N° du dossier

cx004W8160-130009

CCC No./N° CCC - FMS No/ N° VME

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| Evaluation Criteria   | Met | Not met |
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| <b>M.4 LANGUAGE</b>   |     |         |
| The Offeror must confirm that the firm is capable of providing services to the event delegates in both official languages (English and French). As such, the Offeror must include a duly signed and dated copy of the Certification in the Technical Offer portion of the offer submission. |     |         |
| <b>Comments:</b>  |     |         |
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**1.2 Financial Evaluation**

**1.2.1 Evaluation of Price**

The price of the offer will be evaluated in Canadian dollars, Applicable Taxes extra, FOB destination, Canadian customs duties and excise taxes included.

**1.2.2 Financial Evaluation Criteria**

Offers declared fully responsive according to the criteria identified in article 2 Basis of Selection below will be evaluated based on the prices proposed in the Financial Offers.

The Offeror must identify prices and rates in accordance with the Basis of Payment at Annex "B".

**2. Basis of Selection**

**2.1 Basis of Selection - Mandatory Technical Criteria Only**

An offer must comply with the requirements of the Request for Standing Offers and meet all mandatory technical evaluation criteria to be declared responsive. The responsive offer with the lowest Bid Evaluation Value (BEV) will be recommended for issuance of a standing offer.

**APPENDIX "1"****M.2 EXPERIENCE OF PROPOSED RESOURCES - SAMPLE FACT SHEET**

In order to ensure that the evaluation team gets the information needed to evaluate the six (6) event management project samples identified for M.2 Experience of Proposed Resources, please ensure that the following information is provided on a "per project" basis.

Event Management Project Sample # \_\_\_\_\_

Name of the Senior Event Manager: \_\_\_\_\_

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|--|--|
| <b>Client</b>  | Company, department, commission, or agency name.   |
| <b>Client Contact</b>                                | Name and contact information for the company/department/commission/agency representative that managed the project.   |
| <b>Description of the Event</b>                      | Brief description of the event managed, including objectives and event location.   |
| <b>Event Start Date</b>                              | Month, day, and year the event started.  |
| <b>Firm's Assigned Portion of the Overall Budget</b> | What was the total dollar value of the budget managed, including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes? |
| <b>Number of Delegates</b>                           | How many delegates were in attendance?   |
| <b>Profile of Delegates</b>                          | Who attended the event [ie. specify the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates]?  |
| <b>Number of Days On-site</b>                        | How many days was the firm on-site (where "on-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates)?  |
| <b>List of Event Management Services Provided</b>    | What types of event management services were provided (accommodations, hospitality, transportation)? Provide a brief description of each.  |

**APPENDIX "2"****M.3 EXPERIENCE OF THE FIRM - SAMPLE FACT SHEET**

In order to ensure that the evaluation team gets the information needed to evaluate the three (3) event management project samples identified for M.3 Experience of the Firm, please ensure that the following information is provided on a "per project" basis.

Event Management Project Sample # \_\_\_\_\_

Name of the Senior Event Manager: \_\_\_\_\_

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| <b>Client</b>  | Company, department, commission, or agency name.   |
| <b>Client Contact</b>                                | Name and contact information for the company/department/commission/agency representative that managed the project.   |
| <b>Description of the Event</b>                      | Brief description of the event managed, including objectives.  |
| <b>Event Location</b>                                | Where was the event held?  |
| <b>Event Start Date</b>                              | Month, day, and year the event started.  |
| <b>Firm's Assigned Portion of the Overall Budget</b> | What was the total dollar value of the budget managed, including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes?   |
| <b>Number of Delegates</b>                           | How many delegates were in attendance?   |
| <b>Profile of Delegates</b>                          | Who attended the event [ie. specify the sector (private, public or military), ranks or positions, and country(ies) of origin of the delegates]?  |
| <b>Number of Days On-site</b>                        | How many days was the firm on-site (where "on-site" is defined as one or more of the firm's resources having been at the event location(s) and/or travelling with the delegates)?  |
| <b>List of Event Management Services Provided</b>    | What types of event management services were provided (accommodations, hospitality, transportation)? Provide a brief description of each.  |
| <b>Letter of Reference</b>                           | Provide a letter of reference for two (2) of the three (3) event management project samples submitted. One letter of reference must be for one of the two events managed by the Primary Senior Event Manager and one letter of reference must be for the event managed by the Back-up Senior Event Manager. Each letter of reference must be from the client for the event management project sample and be addressed to the Offeror. The Senior Event Manager who worked on the project must be named in the letter of reference. The letter of reference must indicate the client's satisfaction with the performance of the Offeror, including the client's satisfaction with the Offeror's ability to adhere to their quoted budget. |