

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

Title - Sujet CONSULTATION SERVICES	
Solicitation No. - N° de l'invitation EN578-133044/A	Date 2013-08-21
Client Reference No. - N° de référence du client EN578-13-3044	GETS Ref. No. - N° de réf. de SEAG PW-\$\$CY-019-63344
File No. - N° de dossier cy019.EN578-133044	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-09-10	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Gervais, Karine	Buyer Id - Id de l'acheteur cy019
Telephone No. - N° de téléphone (613) 998-7752 ()	FAX No. - N° de FAX (613) 949-1281
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA PORTAGE III 6B1 11 LAURIER ST Gatineau Quebec K1A0S5 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

PROPOSED REQUEST FOR STANDING OFFER - STAKEHOLDER AND CITIZEN ENGAGEMENT AND CONSULATION ACTIVITIES

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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 | Security and Financial 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 and any other annexes.

2. Summary

It should be noted that the activities under this Request for Standing Offer (RFSO) are outside the scope of public opinion research as defined in the Communications Policy of Government of Canada.

i) This Request for a Standing Offer (RFSO) is for the provision of services for Stakeholder and Citizen Engagement activities and consultation to be conducted for various Government of Canada department and agencies. It will be used to authorize Standing Offers (SOs). It is anticipated that a maximum of eight (8) Departmental Individual Standing Offers (DISOs) for each stream may result from this Solicitation. Individual call-ups against the Standing Offer must not exceed \$300,000.00 (excluding GST/HST).

Offerors can bid on one or more of the following service streams:

1. Stream A - Services for In-person Stakeholder and Citizen Engagement activities and consultation;
2. Stream B - Services for online Stakeholder and Citizen Engagement activities and consultation; and
3. Stream C - Services for In-person and Online Stakeholder and Citizen Engagement activities and consultation.

Stream A : In person activities, refers to a variety of interactions between participants and the decision-making body (e.g. Gc), which includes, but is not limited to feedback on discussion documents, roundtable's, workshops, town hall meetings, dialogue sessions, advisory boards and partnerships meant to influence decision-making. Annex A2

Stream B : Online activities, involves the delivery of consultation services using internet-based web tools (e.g. Web 2.0) and technologies that allow for participatory multi-way information sharing, dialogue and user-generated content meant to influence decision-making. Annex A3.

Stream C : Combined in-person and online activities, involves all information details above. Offerors who qualify for both Stream A and B will be issued a standing offer in Stream C (in-person and online).

Each stream will be evaluated separately. As result to this Request for Standing Offer, it is anticipated that standing offers will be issued as detailed in Part 4 - Evaluation Procedures and Basis of Selection. All qualified offers in each stream will be issued a standing offer, up to eight (8).

- (ii) Authorized clients include all departments and agencies listed in schedules I through III of the Financial Administration Act.
- (iii) The period of the Standing Offer will be from date of award to March 31, 2016 with the possibility of two (2) additional one (1) year option periods under the same terms and conditions.
- (iv) The requirement is subject the Agreement on Internal Trade (AIT).
- (v) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security, Financial and Insurance Requirements, and Part 7A - Standing Offer. Offerors should consult the "[Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders](http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31)" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the [Departmental Standard Procurement Documents](#) Web site.
- (vi) Offerors must submit a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2006.
- (vii) 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 Request for Standing Offers (RFSO).
- (viii) This requirement is limited to Canadian services.

3. Security Requirement

There is a security requirement associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and Resulting Contract Clauses.

4. 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 may be in writing, by telephone or in person.

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.

Subsection 5.4 of 2006, Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred and twenty (120) days

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 indicated on page 1 of the Request for Standing Offers.

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 awarded to 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 before the issuance of a standing offer.

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:

an individual;

an individual who has incorporated;

a partnership made of former public servants; or

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 Adjustment Directive

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **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 adjustment 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.

4. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than ten (10) 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,

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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.

5. 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 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 (six hard copies and 1 soft copy on CD)
Section II: Financial Offer (one hard copy and one soft copy on CD)
Section III: Certifications (one hard copy)

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

Prices must appear in the financial 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.

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)

(<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.

Offerors must clearly identify which service streams, outlined in Annex A: Statement of Work, for which the offeror is submitting a bid. Each service stream will be evaluated separately.

Where a offeror is submitting a bid for more than one service stream, only one bid needs to be submitted, however, the offeror must address all requirements separately for each stream.

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex B, Basis of Payment. The total amount of Goods and Services Tax or Harmonized Sales Tax 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.

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.

Section IV: Additional Information

1.1 Offeror's Proposed Site or Premises Requiring Safeguard Measures

As indicated in Part 6 under Security Requirement, the Offeror must provide the required information below, on the Offeror's proposed site or premises for which safeguard measures are required for Work Performance.

Address:

Street Number / Street Name, Unit / Suite / Apartment Number

City, Province, Territory / State

Postal Code / Zip Code

Country

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

Mandatory and point rated technical evaluation criteria and are included in Annex "D"

1.2 Financial Evaluation

Financial evaluation criteria are included in Annex "D"

2. Basis of Selection

2.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all mandatory criteria; and
- (c) obtain the required minimum points specified for each criterion for the technical evaluation,
- (d) and (obtain the required minimum of 375 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 500 points.

- 2. Bids not meeting (a), (b), (c) and (d) will be declared non-responsive.
- 3. The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be **70%** for the technical merit and **30%** for the price.
- 4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **70%**.
- 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of **30%**.
- 6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each service stream, the eight (8) responsive bid(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer.

PART 5 - CERTIFICATIONS

Offerors must provide the required certifications and documentation to be issued a standing offer.

The certifications provided by offerors to Canada are subject to verification by Canada at all times. Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default, if any certification is found to be untrue whether during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply with this request will also render the Offer non-responsive or may result in the setting aside of the Standing Offer or will constitute a default under the Contract.

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.

1.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from HRSDC-Labour's website.

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

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 Canadian Content Certification

This procurement is limited to Canadian services.

The Offeror certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

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

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2.2 Status and Availability of Resources

SACC Manual Clause M3020T (2010/01/11) - Status and Availability of Resources

2.3 Education and Experience

SACC Manual Clause A3010T (2010-08-16) - Education and Experience

PART 6 - SECURITY AND FINANCIAL

1. Security Requirement

1. Before issuance of a standing offer, the following conditions must be met:

(a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;

(b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 7A - Standing Offer;

(c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites; (if there is a requirement for safeguard measures at the Offeror's location, add the following)

(d) the Offeror's proposed location of work performance or document safeguarding must meet the security requirement as indicated in Part 7A - Standing Offer;

(e) the Offeror must provide the address(es) of proposed location(s) of work performance or document safeguarding as indicated in Part 3 - Section IV Additional Information.

2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.

3. For additional information on security requirements, offerors should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents web site.

2. Financial Capability

SACC *Manual* clause M9033T (2011-05-16) Financial Capability

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

1. Offer

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

2. Security Requirement

- 2.1 The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate, Public Works and Government Services Canada.
- 2.2 The Contractor/Offeror personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- 2.3 The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be per-formed at the level of PROTECTED B.
- 2.4 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- 2.5 The Contractor/Offeror must comply with the provisions of the:
- (a) Security Requirements Check List and security guide (if applicable), attached at Annex "C";
 - (b) Industrial Security Manual (Latest Edition)

3. Standard Clauses and Conditions

All clauses and conditions identified in the 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.

4. Term of Standing Offer

4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from date of authorization to March 31, 2015.

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 up to two (2) additional one (1) year periods, from April 1, 2015 to March 31, 2016 and from April 1, 2016 to March 31, 2017 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 thirty (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:

Karine Gervais
Supply Team Leader
Public Works and Government Services Canada
Acquisitions Branch
Communication Procurement Directorate
360 Albert St., 12th floor
Ottawa, Ontario K1A 0S5

Telephone: (613) 998-7752
Facsimile: (613) 949-1281
E-mail address: karine.gervais@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

5.2 Project Authority

The Project Authority for the Standing Offer 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.

In cases where the Project Authority requires public input using a combination of technique involving citizen engagement, consultation, citizen feedback and public opinion research, the Project Authority is responsible for ensuring that the appropriate policies and procedures for each technique are applied (e.g

roundtable's, town hall meetings would follow citizen engagement process, while an opinion-based survey, interviews of focus groups would follow the public opinion research process).

5.3 Standing Offer Holder's Representative

The Offeror has designated the following representative as the central point of contact for all matters pertaining to the Standing Offer:

Nom :

Telephone:

Fax:

E-mail:

6. Proactive Disclosure of Contracts with Former Public Servants

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.

7. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is:

Public Works and Government Services Canada
Acquisitions Branch
Communication Procurement Directorate
360 Albert St., 12th floor
Ottawa, Ontario K1A 0S5

8. Call-up Procedures

8.1 Pool of Offerors

PWGSC - CPD as Contracting Authority and the Project Authority (of the requesting government department, agency or Crown corporation listed in Schedules I, I.1, II, and III of the Financial Administration Act, R.S., 1985, c. F-11) will proceed as follows to issue a Call-up Against the Standing Offer:

1. All Call-ups against a Standing Offer can be made with any of the qualified Standing Offer Holders.
2. The responsibility for Standing Offer Holder selection for any specific Call-up lies solely with the Project Authority.
3. Contact the Public Opinion Research Directorate within Public Works and Government Services Canada for any component of the work to be performed which falls under the Treasury Board definition of public opinion research such as opinion collection thorough opinion surveys, group discussions, interviews etc.

8.2 Standing Offer Holders - Internet Site

The Standing Offer Holder should maintain an Internet site, accessible by Federal Government Departments, Commissions and Agencies, providing information on the services available on this DISO and the Standing Offer Holder's qualifications to provide those services. If the Standing Offer Holder's website specifically refers to products available on its DISO, the information presented must be accurate. The Standing Offer Holder's web site must not suggest that other services, not offered and/or approved by PWGSC for supply against this DISO, are available for purchase through Call-ups Against the Standing Offer. In the event of any discrepancy between the Standing Offer Holder's website and the DISO, the DISO will prevail.

The Standing Offer Holder's DISO website is found at: _____

8.3 Selection Methodology:

- a) A proportional share of the total business will be assigned for each of the top eight (8) Standing Offer Holders based on the highest total score for each Stream; A, B and C.
- b) For each Stream, the first eight (8) Call-ups against a Standing Offer will be assigned on a first come first serve basis starting with the top ranked Standing Offer Holder.
- c) All subsequent Call-ups against a Standing Offer can be made with either of the four (4) SO Holders that are furthest away from their proportional shares as determined in paragraph (a) above. The Project Authority, in consultation with PWGSC, will make the individual selection based on evaluation of the SO Holder expertise. If one of the three (3) SO Holders, furthest away from his share, has not been chosen for five (5) consecutive Call-ups against a Standing Offer, the next Call-up against a Standing Offer will automatically be offered to that SO Holder.
- d) The selection methodology may vary based on the number of Standing Offers issued. For example:
 - if PWGSC awards seven (7) Standing Offers, all subsequent Call-ups against a Standing Offer can be made with either of the three (3) SO Holders that are furthest away from their proportional shares as determined; or
 - if PWGSC awards five (5) Standing Offers, all subsequent Call-ups against a Standing Offer can be made with either of the two (2) SO Holders that are furthest away from their proportional shares as determined.

NOTE: Should an Offeror withdraw his offer or should a Standing Offer be set aside, the share will be recalculated amongst the remaining Offerors based on their original offers.

8.4 Call-up Process:

Only Standing Offer Holders who are "Active Standing Offer Holders" and have been issued a Standing Offer are eligible to be invited to provide services. The following call-up process will be followed:

- a) The Project Authority will forward to PWGSC - CPD the following documents:
 - a Requisition for Goods and Services (9200)
 - the Statement of Work specific to their requirement;
 - the Security Requirements Check List (if applicable)
- b) The Contracting Authority will provide the Project Authority the selection of SO Holders in accordance with the Article titled "Selection Methodology".

- c) The Contracting Authority will provide the SO Holder with a description of the task(s) to be performed and considered as described in Article 6. The SO Holder will be given a maximum of twenty-four (24) hours to state its availability to provide the services within the project time frame, unless the requirement is deemed urgent by the Project Authority, in which case the turnaround time would be shorter.
- b) The SO Holder will submit a project estimate for completion of the Work outlined in the Statement of Work to the Contracting Authority, within forty-eight (48) hours of stating its availability, prior to commencement of the Work.
- c) The project estimate will be established by multiplying the applicable rate(s) as specified in the Basis of Payment by the number of days and / or hours negotiated and agreed upon by the Project Authority and the Offeror. The breakdown of costs and the names of personnel shall be submitted with every proposal.
- d) Travel and living expenses incurred under a Call-up against a Standing Offer will be reimbursed provided that prior approval from the Project Authority was obtained and that they are in accordance with the Treasury Board Travel Directive as stipulated in the Basis of Payment (see Annex 'B').
- e) The Standing Offer Holder will be authorized by the CPD Contracting Authority to proceed with the Work by the issuance of a Call-up against a Standing Offer.
- f) The delivery deadlines as negotiated and specified in the Call-up against a Standing Offer document must be adhered to.
- g) The Standing Offer Holder will not undertake any of the specified Work unless and until a Call-up against a Standing Offer is issued by the CPD Contracting Authority. Any work commenced prior to the receipt of a Call-up will be the sole responsibility of the Standing Offer Holder.
- h) Should the Standing Offer Holder decline to provide the services or be unable to carry out the proposed services within the required time frame, the Project Authority will be required to select another Standing Offer Holder. For each individual Call-up against a Standing Offer, the SO Holder will be approached.

9. Call-up Instrument

The Work will be authorized or confirmed by the Identified User using a "*Call-up Against a Standing Offer*" document.

10. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$ 300,000.00 (Goods and Services Tax or Harmonized Sales Tax included).

11. 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 supplemental general conditions 4008 (2008/12/12), Personal Information and A9122C (2008/05/12) Protection and security of data stored in databases;
- (e) the general conditions 2035 (2013/06/27), General Conditions - Higher Complexity - Services;
- (f) Annex "A", Statement of Work;
- (g) Annex "B", Basis of Payment;
- (h) Annex "C", Security Requirements Check List
- (i) the Offeror's offer dated _____

12. Certifications

12.1 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 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.

12.2 SACC Manual Clauses

<u>NUMBER</u>	<u>DATE</u>	<u>DESCRIPTION</u>
M3800C	2006/08/15	Estimates
M3020C	2010/01/11	Status and Availability of Resources
M3060C	2008/05/12	Canadian Content Certification

13. 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 Ontario.

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

2035 (2013/06/27), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

2.2 Supplemental General Conditions

4008 (2008/12/12) , Personal Information, Apply to and form part of the contract.

2.3 A9122C (2008/12/12), Protection and Security of Data Stored in Databases

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:
 - a. equivalent protections are given to personal information as in Canada under legislation such as the Privacy Act, R.S. 1985, c.P-21, and the Personal Information Protection and Electronic Documents Act, S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and
 - b. The laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in an another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.

4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.
6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

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

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 attached Annex "B".

5.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are _____ (insert "included", "excluded" or "subject to exemption") and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
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 Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

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

5.3 Milestone Payment

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract, article 6. Invoicing Instructions, and the payment provisions of the Contract detailed in article 5. Payment if:

- (a) an accurate and complete invoice and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

OR

5.3 SACC Manual clause H1008C (2008/05/12) Monthly Payment

5.4 Payment by Credit Card

The following credit cards are accepted: _____ and _____.

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.

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
 - b. a copy of the release document and any other documents as specified in the Contract;
 - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
 - d. a copy of the monthly progress report.
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the following address for certification and payment. (to be determined at call-up issuance.
 - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.1 Schedule of Milestones (if applicable)

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"

7. Insurance

SACC Manual clause G1005C (2008-05-12) Insurance

8. SACC Manual Clauses

<u>NUMBER</u>	<u>DATE</u>	<u>DESCRIPTION</u>
A9117C	2007/11/30	T1204 - Direct Request by Customer Department
A2000C	2006/06/16	Foreign Nationals (Canadian Contractor)
C0705C	2010/01/11	Discretionary Audit

8.1 B2008C - Government of Canada Web and Email Standards

The Work must comply with the Government of Canada standards established by the Treasury Board, that include the Standard of Web Accessibility, the Standard on Web Usability, the Standard on Web Interoperability, the Standard on Email and the Standard on Optimizing Websites and Applications for Mobile Devices.

In addition, the Work must comply with the standards and guidelines developed by the department or agency for whom the Work is being performed. Such standards and guidelines are available from the department or agency's Web Standards Centre of Expertise.

9. Authorities

9.1 Contracting Authority

The Contracting Authority for the Call-up will be identified in the resulting Call-up against the Standing Offer.

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

9.2 Project Authority

The Project Authority for the Standing Offer will be identified in the Call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Call-up and is responsible for all matters concerning the technical content of the Work under the Call-up. Technical matters may be discussed with the Project Authority, however the

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Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a call-up amendment issued by the Contracting Authority.

10. Basis for Canada's Ownership of Intellectual Property

PWGSC has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: (6.4.1) the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

11. Limitation of Liability - Information Management/Information Technology

1. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this section, even if it has been made aware of the potential for those damages.
2. First Party Liability:
 - a. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - ii. physical injury, including death.
 - b. The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - d. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (a) above.
 - e. The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
 - i. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - ii. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (ii) of the greater of _____ times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$_____. (Insert the amount from the appropriate commodity grouping.)

In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$_____, (insert the dollar amount entered in subparagraph (ii)), whichever is more.

-
- f. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

3. Third Party Claims:

- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

ANNEX "A"

ANNEX A1: General Information for the provision of Services for Stakeholder and Citizen Engagement and Consultation Activities for the Government of Canada

A1.1 BACKGROUND

The need to provide opportunities for meaningful and effective stakeholder and citizen engagement through dialogue is essential in achieving objectives in the fulfillment of the Government of Canada's (GC) mandate. The GC recently committed to the Open Government Initiative, which includes a commitment to Open Dialogue. Through Open Dialogue, the GC is committed to engaging Canadians because their input informs the work of Government and helps the Government make better decisions for all Canadians.

The Communications Policy of the Government of Canada requires departments to consult the public, listen to and take account of people's interests and concerns when establishing priorities, developing policies, and planning programs and services. The government must learn as much as possible about public needs and expectations to respond to them effectively. The dialogue between citizens and their government must be continuous, open, inclusive, relevant, clear, secure and reliable. Communication is a two-way process.

The objective of stakeholder and citizen engagement and consultation is to directly engage the public through active two-way dialogue whether in person or on-line. This activity enables the government to take into account the public's views, concerns, ideas and proposals in the development or assessment of government policies, programs, services and initiatives.

Therefore, the GC engages stakeholders, citizens and experts in various ways to develop more informed and effective policies, programs, services and regulations.

The GC seeks the services of firms with the capacity and expertise required to undertake the development, planning and implementation of in-person and/or online stakeholder and citizen engagement and consultation activities, on an as-and-when-required basis.

As a result, the GC has a requirement to establish Standing Offers (SO) with contractors qualified to provide stakeholder and citizen engagement and consultation services to support policy, program, service or regulatory initiatives.

Via this SO, the GC will be able to issue call-ups to fulfill their requirements for in-person or online stakeholder and citizen engagement and consultation activities in a timely manner.

A1.2. OBJECTIVES

In this context, the Gc distinguishes between "in-person" and "online" services for stakeholder and citizen engagement and consultation activities, designating each as a separate stream of service within the Request for Standing Offer (RFSO). The GC intends to establish SOs in the following two streams:

1. Stream A - Services for In-person Stakeholder and Citizen Engagement activities and consultation;
2. Stream B - Services for online Stakeholder and Citizen Engagement activities and consultation; and
3. Stream C -Services for In-person and Online Stakeholder and Citizen Engagement activities and consultation..

The Gc wishes to establish SOs with up to eight (8) firms, for each stream of service noted above.

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Offerors may bid either on Stream A or Stream B or both Stream A and B. However, they must submit a distinct bid for each of the streams of service. It should be clearly indicated which stream of service they are bidding on. Proposals will be assessed separately for each stream and SOs will be awarded to offerors who achieve the highest scores for the combined technical merit and price for each particular stream.

CAVEAT

It should be noted that the activities under this SO are outside the scope of public opinion research (POR) as defined in the Communications Policy of the Government of Canada. As such, it does not include:

"The planned gathering, by or for a government institution of opinions, attitudes, perceptions, judgments, feelings, ideas, reactions, or views that are intended to be used for any government purpose, whether that information is collected from persons (including employees of government institutions), businesses, institutions or other entities, through quantitative or qualitative methods, irrespective of size or cost" when these activities are undertaken for policy research; market research; communications research, communication strategies and advertising research; program evaluation; quality of service/customer satisfaction studies; omnibus surveys, with the placement of one or more questions; syndicated studies; or product development. Please note: Communications Policy of the Government of Canada: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316§ion=text>
Procedures for Planning and Contracting Public Opinion Research: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16491§ion=text>

The conduct of POR in the Government of Canada **must** be undertaken as per established procedures. It is incumbent upon the Departmental Project Authority to ensure their project receives the appropriate approvals and utilizes the appropriate contracting mechanism.

In cases where the Departmental Project Authority requires public input using a combination of techniques involving citizen engagement, consultation, citizen feedback and public opinion research, the Departmental Project Authority is responsible for ensuring that the appropriate policies and procedures for each technique are applied (e.g. roundtable's and town hall meetings would follow the citizen engagement process, while an opinion-based survey, interviews or focus groups would follow the public opinion research process).

A1.3 SCOPE

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

The Contractor shall complete all tasks and submit to the Project Authority all deliverables as specified in each call-up, in accordance with applicable Gc and departmental/agency legislative and policy requirements and relevant standards and guidelines as listed in Annex A2 and Annex A3 Specifications and Standards hereafter referred to Specifications and Standards.

Before commencing work, the Contractor must be in possession of a Call-up against a Standing Offer duly authorized by the appropriate Gc Contracting Authority.

The Contractor will be required to provide services to conduct either in-person and/or online stakeholder and citizen engagement consultation activities, as identified in Annex A2 and Annex A3.

A1.4. DELIVERABLES

The Project Authority and/or Technical Lead will meet with the Contractor and/or review all deliverables submitted by the Contractor. The Project Authority will provide comments to the Contractor indicating any

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changes or revisions required to the written deliverables, including but not limited to the approach, timelines, tools, and reports. The review of deliverables with the Contractor may be held periodically at the Project Authority's location, or take place via conference call, video conference or by e-mail.

The Contractor must ensure that all deliverables are compatible with the technical specifications identified by the Project Authority within the call-up. Deliverables may include but are not limited to written reports, databases, web pages, applications, editable files or spreadsheets. If the deliverable is a report then all embedded objects in these reports shall be provided to the Project Authority in separate editable electronic files in a format acceptable to the Project Authority.

It is expected that written deliverables will be requested in Microsoft Office to ensure accessibility. The Contractor shall provide deliverables in either or both official languages as identified in the call-up.

The Contractor must provide the GC with the services described in the call-up and shall ensure the completion of all deliverables in a timely and responsive manner. All reports, deliverables and services rendered under a call-up are subject to inspection by the Project Authority and, for technical components, the Technical Lead. The Project Authority and Technical Lead will review all deliverables for adherence to GC and departmental policies and standards, performance, quality, detail and format to determine if the work is satisfactory.

If any deliverable is not to the satisfaction of the Project Authority, and for requirements under Stream B, the Project Authority or Technical Lead may reject it or require correction(s) to the deliverable. In addition, if any deliverable is not to the satisfaction of the Project Authority or the Technical Lead, either may direct the Contractor to undertake only those activities directed at improving that deliverable until it is acceptable to the Project Authority and/or Technical Lead.

All reports, presentation decks and other written documents may be required in hard copy format and/or in electronic format, as specified in the call-up. Alternate formats may also be requested in the call-up, including, but not limited to, large print, Braille, audiocassette, E-Text diskette, E-Text CD, Daisy. Refer to Financial Section for information on reimbursement for these costs.

Upon the completion of the project and acceptance by the Project Authority and the Technical Lead, all data must be transferred to the Project Authority in accordance with the Specifications and Standards listed in Annex A2 and Annex A3, and in a format specified by the Project Authority. The Technical Lead will work with the Contractor to assist and verify that security, Information Management and privacy requirements of the Department are met.

Deliverables will include but are not limited to: raw data in various formats (i.e.HTML, Excel, SPSS, SAS, databases); proof of data collection details (server, database, etc.) and security; and details of data facility (monitoring, facility specifications, etc.).

Other deliverables could include such items as: periodic (as determined by the Project Authority) updates on access, usage and completion rates, a toll free number and TTY line for client requests for assistance, reminder functions to increase usage/completion, etc.

The Contractor shall provide deliverables in either or both official languages as identified in the call-up, which may include translation services of material. The Project Authority must approve all material.

A1.5 RESPONSIBILITIES

A1.5.1 Project Authority and Technical Lead responsibilities:

The Project Authority and Technical Lead will be responsible for coordinating the overall project, providing guidance to the Contractor, as required, and accepting and approving Contractor deliverables. Additionally, these representatives will:

- Ensure that the appropriate Gc subject matter, privacy and technical experts are available to the Contractor to discuss and provide content, source and/or reference material, review deliverables, as well as to facilitate cooperation with other governmental and/or non-governmental representatives.
- Provide the Contractor with supporting background documentation and information not easily accessible to the Contractor, including (but not limited to) any government and departmental policies, procedures, guidelines, templates, publications, reports and studies required by the Contractor to completed the requirements within each call-up;

A1.5.2 Contractor's responsibilities:

In addition to the completion of the deliverables and requirements specified in the call-up against this SO, the Contractor must adhere to the following:

- Be available, with a minimum 24 hour notice, to attend meetings with the Project Authority in-person and/or by teleconference as convened by the Project Authority, when required;
- Be cognizant of and apply appropriate techniques, strategies and methodologies to account for and manage regional context, and to ensure an understanding of how regional disparities and content fit within the consultation activity which it undertakes;
- Ensure that any consultation material and communications with Canadians and/or stakeholders, and during the performance of any work resulting from a call-up, regardless of medium (print or web) adhere to the Specifications and Standards identified in Annex A2 and Annex A3 and to the Terms and Conditions herein; and
- At the completion of its work under a call-up, the Contractor must immediately provide the Project Authority with all records of information collected during the course of work under the call-up, including but not limited to:
 - Correspondence with participants
 - Meeting/discussion notes related to the consultation
- In addition to the timely submission of all deliverables and fulfillment of obligations specified within each call-up, it is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Authority. Communication is defined as all reasonable efforts to inform all parties of plans, decisions, proposed approaches, implementation, and results of work, to ensure that the project is progressing well and in accordance with expectations.
- Communication may include: phone calls, electronic mail, faxes, mailings and meetings. In addition, the Contractor is to immediately notify the Project Authority of any issues, problems, or areas of concern in relation to any work under a call-up against these SOs, as they arise.
- As required, the Contractor shall submit formal status reports (written or verbally) that identify the activities that the Contractor accomplished since the last status report, those that were planned but not accomplished since the last status report and those planned for the next reporting period. Each call-up will specify the reporting requirements of the Project Authority.

A1.6. ADDITIONAL REQUIREMENT REGARDING SERVERS

Any servers, including back-up servers, containing or collecting data for the Gc must be located within and only accessible within Canadian boundaries, in a facility that has the Document Safeguarding Capability (DSC) specified in the call-up. The database must be physically independent from all other databases that, directly or indirectly, are located outside of Canada. All aspects of data processing must be conducted and only accessible within Canadian boundaries.

A1.7. WORK AND CONTRACT CONSTRAINTS

A1.7.1. Standards and Specifications

All services rendered and deliverables completed in response to a call-up shall be in compliance with all relevant Departmental and GC Acts, codes, regulations and policies in effect at the time of the call-up. Specific program documents for the consultation activity will be provided to the Contractor at the time of call-up.

The specific standards and specifications can be found in Annex A2 for In-Person Stakeholder and Citizen Engagement and Consultation Activities and Annex A3 for Online Stakeholder and Citizen Engagement and Consultation Activities.

A1.7.2. Language of Work

The GC is required under the Official Languages Act to provide its services in either official language of Canada. As such, and given the nature of the requirements, the Contractor must have the capacity to conduct the work in both English and French. Specific language requirements will be defined within individual call-ups.

As specified in the current Guideline for External Use of Web 2.0, the use of translation software or automated translations offered on web sites are not recommended for use in an official communications context given their limitations. The Gc is responsible for the content of the information provided, even when the information is housed on third-party platforms, and therefore would be responsible for the quality of translations generated by automated software.

A1.7.3 Access to Information and Privacy

The GC is required to comply with the Access to Information and Privacy Acts. In the conduct of engagement and consultation activities, compliance with the Privacy Act is of utmost concern. As such, specific privacy requirements will be identified in each call-up.

The Contractor acknowledges that Canada is bound by the Privacy Act, R.S., 1985, c. P-21, with respect to the protection of personal information as defined in the Act. The Contractor must keep private and confidential any such personal information collected, created or handled by the Contractor under the Contract, and must not use, copy, disclose, dispose of or destroy such personal information except in accordance with this clause, or with specific privacy clauses included in the individual call-up, and the delivery provisions of the Contract.

All such personal information is the property of Canada, and the Contractor has no right in or to that information. The Contractor shall ensure that the personal information is protected against loss or theft as well as unauthorized access, disclosure, transfer, copying, use, modification or disposal.

The Contractor must deliver to Canada all such personal information in whatever form, including all working papers, notes, memoranda, reports, data in machine-readable format or otherwise, and

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documentation which have been made or obtained in relation to the Contract, upon the completion or termination of the Contract, or at such earlier time as Canada may request. Upon delivery of the personal information to Canada, the Contractor will have no right to retain that information in any form and must ensure that no record of the personal information remains in the Contractor's possession.

Annex A2: Stream A

Services for in-person stakeholder and citizen engagement and consultation activities refers to a variety of two-way interactions between participants and the decision-making body (i.e GC), which includes, but is not limited to feedback on discussion documents, roundtable's, workshops, town hall meetings, dialogue sessions, advisory boards and partnerships meant to influence decision-making. Please refer to Annex X entitled Relevant Terms for a complete definition of stakeholder and citizen engagement and consultation activities.

A call-up under Stream A may include any or all of the following activities; planning, developing and implementing innovative and participatory consultation activities aimed at involving Canadians, stakeholders and/or experts in meaningful and effective consultations. Activities may be of varying scope (regional versus national), and directed to all Canadians or targeted audiences, including, but not limited to, individuals, non-governmental organizations, industry, municipal, provincial and territorial governments, Aboriginal Peoples, academia, post-secondary institutions and its associations, ethno-cultural communities, people with disabilities, or official language minority communities, etc.

Under Stream A, the Contractor's responsibilities shall include, but are not limited to, the following, as specifically detailed in each call-up:

A2.1. Services Required

A2.1.1. Expert and Strategic Advice and Services for Stakeholder and Citizen Engagement and Consultation Activities:

The designated resource providing Expert and Strategic Advice Services will be responsible for the following, but not limited to:

- a) Provide expert and strategic advice on the design, development and implementation of stakeholder and citizen engagement and consultation strategies, approaches and plans. Plans and strategies should include, but are not limited to, any combination of the following or other components as required:
 - Purpose statement;
 - Background;
 - Objectives;
 - Environmental scan;
 - Proposed methodology (ies) along with rationale and techniques considered;
 - Activities, deliverables and timelines;
 - Expected outcomes/results;
 - Data collection and analysis framework/methodology;
 - Stakeholder identification and/or analysis;
 - Communications plans/strategies;
 - Rules of Engagement
 - Level of effort and budget;

- b) Design stakeholder and citizen engagement and consultation activities using a variety of consultation methods and techniques, which could include specialized methodologies (e.g. roundtables, workshops, deliberative dialogue, 21st Century Town Hall, Open Space™ technology, appreciative inquiry, citizen juries, consensus conference, future search conference, citizen choice work, national issues forums, world café, etc.); or others as defined by the Project Authority;

- c) Provide other advice and guidance relating to stakeholder and citizen engagement and consultation activities, such as on the development of any or all consultation material, including, but not limited to factual/behavioural based questionnaires seeking to collect factual or behavioural information and other data collection tools used for a two-way discussion as defined in Annex E;
- d) Evaluation framework describing evaluation objectives, indicators and evaluation tools to be used;
- e) Provide verbal and written presentation of findings to key departmental officials.

A2.1.2 Project Management Services

The designated resource providing Project Management Services will be responsible for the following, but not limited to:

- a) Develop a detailed project plan/work plan, in collaboration with the Project Authority, that outlines the proposed schedule (including the level of effort and time required by each of the project team members to carry out each task), budget breakdown, milestones, and timelines;
- b) Attend planning meetings with Project Authority either in person or by teleconference;
- c) Implement the plan, manage complex activities, changing environments and changing directions of projects;
- d) Manage overall tasks, deadlines, budget, and report on progress;
- e) Monitor and ensure compliance of all applicable Gc legislative and policy requirements and applicable Gc Specifications and Standards listed in Section A2.2;
- f) Provide other project management services, as required.

A2.1.3 Content Development Services

The designated resource providing Content Development Services will be responsible for the following, but not limited to:

- Review background information, analysis and/or writing service work required to produce any or all documents/material required for the stakeholder or citizen engagement and consultation activity.

Documents may include (but will not be limited to) the following:

- a) Background documents, fact sheets, and presentation materials based on research and analysis of key documents and/or studies;
- b) Factual/behavioural-based questionnaires and other data collection tools intended for the consultation and/or engagement purposes as defined in Annex E;
- c) Agendas, invitations, process maps, participant kits, consent & evaluation forms;
- d) Discussion guides or workbooks;
- e) Ensure translation of documents if required by the Project Authority
- f) Speaking notes, fact sheets, backgrounders, communiqués, power point presentations, etc.

A2.1.4 Logistics Planning Services

The designated resource providing Logistics Planning Services will be responsible for the following, but not limited to:

- a) Event planning including, but not limited to:
 - Determining venue security requirements for the event;
 - Providing advice and managing protocol for dignitaries at the local, national or international level;
 - Inviting participants and obtaining appropriate participant consent, if required;
 - Inviting subject matter experts/speakers when required;
 - Drafting and coordinating the invitation and managing the RSVP process including the participant registration process;
 - Arranging hospitality, renting meeting space, and making travel arrangements in accordance with applicable Gc policies and directives listed in Section A2.2;
 - Arranging the rental of audiovisual equipment;
 - Arranging for simultaneous interpretation;
 - Arranging for video conferencing;
 - Arranging for a photographer/videographer;
- b) Photocopying documents and other supporting materials and arranging for shipping to the location(s) of the consultation(s) as needed;
- c) Preparing and distributing materials to participants in advance (participant kits) by mail, email or by other means;
- d) Providing on-site assistance;
- e) Providing other logistics planning services, as required.

A2.1.5 Facilitation Services

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

- a) Prepare a facilitator's guide and/or a participant guide to ensure that the objectives of the call-up are fulfilled;
- b) Conduct the facilitation of the stakeholder and/or citizen engagement activities by generating dialogue between participants and the decision-making body (i.e GC) ;
- c) Record notes.

The Contractor may be required to provide facilitation services under the following varying environments and conditions:

- Regional, national and/or international in scope;
- Using an approach and format that is acceptable and appropriate to the group or constituency which either targets scientific/professional specialists, high level policy thinkers and/or decision makers, citizens; or targets groups with diverse interests and from different constituencies (e.g., Aboriginal Peoples, women, ethno-cultural communities, people with disabilities, official language minority groups, seniors and youth).

A2.1.6 Data Analysis and Reporting Services

The designated resource providing Data Analysis and Reporting Services will be responsible for the following, but not limited to:

- a) Conduct research and analysis to write final reports resulting from post-consultation analysis of the data collected.
- b) The provision of data analysis and report development services may include (but are not limited to) the development and/or review of the following documents:
 - Planning and outlining methodology for data collection and analysis;

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- Quantitative analysis on factual/behavioural-based findings and/or qualitative analysis of feedback obtained as defined in Annex E;
 - Propose outline of final comprehensive findings report based on analysis and assessments;
 - Analysis methods and framework, synthesis, and recommendations;
 - Draft comprehensive report;
 - Draft summary report suitable for sharing with participants based on the template required by the Project Authority;
 - Final comprehensive and summary reports based on approved drafts;
 - Prepare a presentation (verbal or written) of findings for the Project Authority;
 - Assessment of the engagement activity in a rigorous and objective manner to identify what worked, what did not, the cost-effectiveness of the activity, whether the results achieved matched the objectives, and any lessons learned;

A2.2 Specifications and Standards

The Contractor must ensure that the following Gc Acts, Codes, Regulations and/or Policies are adhered to in the performance of any call-up:

- a) Communications Policy of the Government of Canada
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316>
- b) Procedures for Planning and Contracting Public Opinion Research:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16491§ion=text>
- c) Federal Identity Program Policy: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12314>
- d) Policy on Government Security: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578§ion=text>
- e) Operational Security Standard: Management of Information Technology Security (MITS):
[Http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328](http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328)
- f) Canadian Industrial Security Directorate (CISD) policies related to personnel security screening:
<http://ssi-iss.tpsgc-pwgsc.gc.ca/ssi-iss/sc-cs/sc-cs-eng.html>
- g) Directive on the Management of Expenditures on Travel, Hospitality and Conferences:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=19855>
- h) Official Languages Act: <http://www.laws-lois.justice.gc.ca/eng/acts/O-3.01/>
- i) Policy on Official Languages: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26160>
- j) Directive on Official Languages for Communications and Services
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26164>
- k) Privacy Act: <http://laws-lois.justice.gc.ca/eng/acts/P-21/>

The Contractor must ensure that the industry standards and/or best practices of the following organization are adhered to in the performance of any call-up:

- a) Recognized stakeholder engagement standards, as identified by the International Association for Public Participation (IAP2), International Association of Facilitators. [Http://www.iap2.org/](http://www.iap2.org/)
- b) The information or data related to a call-up under this RFSO must not be destroyed, archived or alienated in any manner without the authority of the Librarian and Archives Canada as managed by the Project Authority.

Annex A3: Stream B

Services for online Stakeholder and citizen engagement and consultation activities involves the delivery of consultation services using internet-based web tools (e.g. Web 2.0) and technologies that allow for participatory multi-way information sharing, dialogue and user-generated content meant to influence decision-making. Please refer to Annex E entitled Relevant Terms for a complete definition of Online Stakeholder and Citizen Engagement and Consultation activities.

A call-up under Stream B may include any or all of the following: planning, developing, and delivering electronic forms of consultation activities that are innovative and participatory, and aimed at involving Canadians, stakeholders and/or experts in meaningful and effective engagement/consultations. Included within the scope of these services are the development, provision, implementation, hosting and execution of online consultations, including tools, platforms, online presence, application development, online facilitation with Government of Canada participation, translation, evaluation, analysis, and report writing services.

Under Stream B, the Contractor's responsibilities shall include, but are not limited to, the following, as specifically detailed in each call-up:

A3.1. Services Required

A3.1.1. Expert and Strategic Advice and Services for Online Stakeholder and Citizen Engagement and Consultation Activities

The designated resource providing Expert and Strategic Advices Services will be responsible for the following, but not limited to:

- a) Provide expert and strategic advice on the design, development, provision and/or execution of online engagement/consultation strategies and approaches to meet the consultation objectives;
- b) Provide recommendations of suitable online consultation processes, tools and platforms to meet the engagement/consultation objectives.
- c) Prepare an engagement/consultation plan that meets the objectives using a variety of new and innovative technologies, methods and techniques. Plans may include any combination of the following or other components as required:
 - Purpose statement;
 - Background;
 - Objectives;
 - Environmental scan;
 - Proposed electronic methodology(ies) along with rationale and techniques considered;
 - Activities, deliverables and timelines;
 - Expected outcomes/results;
 - Accommodation and Participation strategies indicating how individuals will be able to access and participate in the consultation, (e.g. people with disabilities, aboriginals, seniors, rural areas, etc.). Exemptions to standards, as it pertains to people with disabilities and accessibility, are not to be used without authorization of the Project Authority;
 - Stakeholder identification and/or analysis;
 - Communications plans/strategies;
 - Rules of Engagement;

- Level of effort and budget of the activity;
- d) Provide other advice and guidance relating to stakeholder and citizen engagement and consultation activities, such as on the development of any or all consultation material, including but not limited to, factual/behavioural-based questionnaires and other data collection tools used for a two-way discussion between participants and the Government of Canada representative(s),
- e) Prepare and design a plan for online presence that includes, but is not limited to any combination of the following:
- Proposed technology, tools, platforms and options considered that best meet the objectives showing how requirements, standards and guidelines, including the Web Standards for the Government of Canada (including those related to accessibility and usability) are met;
 - Design online consultation activities using a variety of methods and techniques used for a two-way discussion such as, but not limited to, online Q & A sessions, idea crowdsourcing, facilitated or non-facilitated online discussion boards, Twitter town halls, webinars and/or interactive tools meant to engage stakeholders and citizens in decision-making and influencing change;
 - Identifying users, requirements, expectations, wire frames, mock-ups, information architecture and navigation;
 - Approach to the delivery and maintenance of security requirements, including security-related documentation (i.e. security screening log, Threat Risk Assessment, data management, etc.);
 - Data collection and analysis framework/methodology;
- f) Evaluation framework describing evaluation objectives, indicators and evaluation tools to be used;
- g) Recommendations based on feedback received from the evaluation; and
- h) Provide other advice and guidance relating to online stakeholder and citizen engagement/consultation services, as required.

A3.1.2. Project Management Services

The designated resource providing Project Management Services will be responsible for the following, but not limited to:

- a) Develop a detailed project plan/work plan, in collaboration with the Project Authority, that outlines the proposed schedule (including the level of effort and time required by each of the project team members to carry out each task), budget breakdown, milestones, and timelines;
- b) Attend planning meetings with the Project Authority either in person or by teleconference;
- c) Implement the plan, manage complex activities, monitor web analytics, changing environments and changing directions of projects;
- d) Manage overall tasks, deadlines, budget, and report on progress;
- e) Monitor and ensure compliance of all applicable Gc legislative and policy requirements and of applicable Gc Specifications and Standards listed in Section A3.2;
- f) Invite participants including subject matter experts, if required;
- g) Ensure appropriate participant consent and privacy rights are included in the development of any online activities,
- h) Provide other project management services, as required.

A3.1.3 Content Development Services

The designated resource providing Content Development Services will be responsible for the following, but not limited to:

- a) Review background information, analysis and web writing service work required to produce the material required for online consultations;
- b) Prepare and format any developed content for web posting in accordance with Specifications and Standards as listed in Section A3.2.
- c) The provision of content development and formatting for online engagement/consultation activities may include (but is not limited to) the development and/or review of the following documents:
 - Background documents, facts sheets, speaking notes, communiqués, agendas and presentation materials based on research and analysis of key documents and/or studies;
 - Workbooks, discussion guides, online forms, factual/behavioural-based questionnaires and other data collection tools intended for consultation and/or engagement purposes as defined in Annex E;
 - Translation of documents if required by the Project Authority;
 - Create web content for online presence;
 - Security methodology for data protection including: the capture, access, storage, transmission, back-up, retrieval archiving, device data cleansing and disposal of information and data;
 - Sample formats/templates for how information will be captured;
 - Develop content in response to ongoing moderated dialogue.

A3.1.4 Development of Online Presence

The designated resource providing Computer and Information systems Services¹ will be responsible for the following, but not limited to:

- a) Develop online tools, applications, web pages, online content and/or databases to support the objectives of the online consultation services required by the Project Authority;
- b) Liaise with the Project Authority/Technical Lead to review the technical specifications for the tools and applications to be used to ensure that all compliancy issues respect the Specifications and Standards listed in Section A3.2;
- c) Complete the design, development, implementation, programming, and testing of any tools for the online consultation, which may include, but are not limited to, web pages, online forms, workbooks and factual/behavioural based questionnaires;
- d) Design, develop or make available a repository for the collection and storage of all the data (whether it be a database or generic e-mail) for the duration of the consultation activity; and, develop the migration plan for all raw data in the format chosen by the Project Authority and respects all related Specifications and Standards listed in Section A3.2;
- e) Ensure that the development or provision of any tool/web presence/ application are Gc approved and complies with all Specifications and Standards identified in Section A3.2;
- f) Obtain acceptance and sign-off from the Project Authority and the Technical Lead prior to the implementation of the engagement/consultation activity and make and verify all corrections identified by the Technical Lead prior to the engagement/consultation launch date.

A3.1.5. Testing of the Online Presence

The designated resource providing Computer and Information systems Services will be responsible for the following, but not limited to:

¹ Refer to the http://www5.hrsdc.gc.ca/NOC/English/NOC/2011/QuickSearch.aspx?val65=* for a list of relevant job titles under classifications under 2172, 2174, 2175 for work required under this service category.

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- a) Conduct technical testing and user acceptance testing of the engagement/ consultation tool to ensure that any application or platform is fully functional and complies with all Specifications and Standards as listed in Section A3.2;
 - b) Conduct security testing of any application, platform and /or web pages to ensure they are secured against input of scripts or hacking of code;
 - c) Conduct and confirm load testing to ensure that any application, platform and/or web pages and servers can handle the demand of users;
 - d) Conduct full testing of the live environment, either within the Gc or on external servers depending on the hosting environment as specified in the call-up;
 - e) Conduct usability testing;
 - f) Conduct a full de-bugging phase to ensure quality of coding contained with application or web pages developed.

A3.1.6. Execution of Online Stakeholder and Citizen Engagement and Consultation Activity

The execution of the online activity will require a designated resource providing Facilitation Services and a designated resource providing Computer and Information systems Services to be responsible for the following, but not limited to:

- a) Provide bilingual facilitation services for online engagement/consultations activities appropriate to the tool/platform used, and are two-way in nature (i.e. dialogue). The extent of the role of the facilitator will be dependent on the consultation but may include such things as; electronic facilitation, reminders and prompts, agenda preparation, interpreting and applying rules of engagement, responses to questions, daily updates.
- b) Provide English to French and/or French to English translation services for online dialogue during online consultation activities, in accordance with a pre-defined frequency of translation, to be agreed upon with the Project Authority. As specified in the current Guideline for External Use of Web 2.0, the use of translation software or automated translations offered on web sites are not recommended for use in an official communications context given their limitations. The Gc is responsible for the content of the information provided, even when the information is housed on third-party platforms, and therefore would be responsible for the quality of translations generated by automated software.
- c) Collect, store and maintain back-ups of all data for the duration of the call-up while at all times meeting all of the Specifications and Standards listed in section A3.2. Methods of collection will include but are not limited to the creation and maintenance of generic email accounts and databases, or any other Internet based web tools/technologies (e.g. Web 2.0) that collect and store data.
- d) The Contractor shall provide troubleshooting and technical support services to participants, including but not limited to issues of web accessibility for people with disabilities.

A3.1.7. Data Analysis and Reporting

The designated resource providing Data Analysis and Reporting Services will be responsible for the following, but not limited to:

- a) Conduct research and analysis to write final reports resulting from post-consultation analysis of the data collected;

The provision of data analysis and reporting services may include (but is not limited to) the development and/or review of the following documents:

- Planning and outlining methodology for data collection and analysis;
- Quantitative analysis on factual/behavioural-based findings and/or qualitative analysis of feedback obtained as defined in Annex E ;

- Analysis methods & framework, synthesis, and recommendations;
- Draft comprehensive report;
- Draft summary report suitable for sharing with participants based on the template required by the Project Authority;
- Final comprehensive and summary reports based on approved drafts;
- Prepare a presentation of findings (verbal and/or written) for the Project Authority;
- Assessment of the engagement activity in a rigorous and objective manner to identify what worked, what did not, the cost-effectiveness of the activity, whether the results achieved matched the objectives, and any lessons learned.

A3.2. Specifications and Standards

The Contractor must ensure that the following Gc Acts, Codes, regulations and/or Policies are adhered to in the performance of any call-up:

- a) Web Standards for Government of Canada <http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp>
- b) Web Experience Toolkit: <http://www.tbs-sct.gc.ca/ws-nw/wa-aw/wet-boew/index-eng.asp>
- c) Communications Policy of the Government of Canada:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316>
- d) Procedures for Planning and Contracting Public Opinion Research:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16491§ion=text>
- e) Federal Identify Program Technical Specifications for the Standard on Web Usability:
<http://www.tbs-sct.gc.ca/ws-nw/wu-fe/wu-fe-guid-eng.asp>
- f) Policy on Government Security: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578>
- g) Operational Security Standard: Management of Information Technology Security (MITS):
http://www.tbs-sct.gc.ca/pubs_pol/gospubs/TBM_12A/23RECON_e.asp
- h) Canadian Industrial Security Directorate (CISD), policies related to personnel security screening:
<http://ssi-iss.tpsgc-pwgsc.gc.ca/ssi-iss/personnel/enqut-scrnng-eng.html>
- i) Directive on the Management of Expenditures on Travel, Hospitality and Conferences:
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=19855>
- j) Official Languages Act: <http://www.laws-lois.justice.gc.ca/eng/acts/O-3.01/>
- k) Policy on Official Languages <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26160>
- l) Directive on Official Languages for Communications and Services
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26164>
- m) Privacy Act: <http://laws.justice.gc.ca/en/P-21/index.html>
- n) Guideline for External Use of Web 2.0
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=24835§ion=text#secA.8>
- o) Information Management Policy: <http://www.tbs-sct.gc.ca/im-gi/imp-pgi/imp-pgi-eng.asp>

The Contractor must ensure that the following requirements are adhered to in the performance of any call-up:

- a) Recognized stakeholder engagement standards, as identified by the International Association for Public Participation (IAP2), International Association of Facilitators. <http://www.iap2.org/>
- b) The information or data related to a call-up under this RFSO must not be destroyed, archived or alienated in any manner without the authority of the Librarian and Archives Canada as managed by the Project Authority.
- c) The Contractor must ensure to make available a policy statement concerning the use of cookies, log files and, if applicable, software. This statement may be either included in their privacy policy or it may

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appear in a separate document. Software must not be installed on Respondents' computers without their knowledge or consent;

- d) The Contractor must ensure that data collected is able to migrate from the Contractor's system to the then current, Gc operating environment without change to the design or technical architecture. Proper methods of disposal and/or transfer of sensitive content collected during the consultation must be agreed upon by the Contractor and Gc prior to the development phase; and
- e) Any developed tool/application, web pages and/or data must be provided to the Project Authority and Technical Lead upon completion of the consultation in the format specified in the call-up (for example on CD or USB Key).

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ANNEX "B" BASIS OF PAYMENT

NOTE TO OFFERORS:

Offerors must submit an hourly rate for each of the six (6) categories of service.

The names of resources which will be identified in any resulting call-up against the Standing Offer must meet the minimum requirements for the category of service for which they are being proposed.

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to any resulting Call-up against the Standing Offer.

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

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

B.1.1 HOURLY RATES FOR THE STANDING OFFER FOR STREAM A: In-Person Stakeholder and Citizen Engagement and Consultation Services

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

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

Category of Service	NAME OF RESOURCE	HOURLY RATE FOR CONTRACT PERIOD	HOURLY RATE FOR OPTION PERIOD 1	HOURLY RATE FOR OPTION PERIOD 2
Expert and Strategic Advice Services	To be identified prior to first call-up	\$	\$	\$
Project Management Services	To be identified prior to first call-up	\$	\$	\$
Facilitation Services	To be identified prior to first call-up	\$	\$	\$
Logistics Planning Services	To be identified prior to first call-up	\$	\$	\$
Content Development Services	To be identified prior to first call-up	\$	\$	\$
Data Analysis and Reporting Services	To be identified prior to first call-up	\$	\$	\$

Solicitation No. - N° de l'invitation
EN578-133044/A

Amd. No. - N° de la modif.
cy019EN578-133044

Buyer ID - Id de l'acheteur
cy019

Client Ref. No. - N° de réf. du client
EN578-13-3044

File No. - N° du dossier
cy019EN578-133044

CCC No./N° CCC - FMS No/ N° VME

B.1 .2 HOURLY RATES FOR THE STANDING OFFER FOR STEAM B : Online Stakeholder and Citizen Engagement and Consultation Services

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

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

Category of Service	NAME OF RESOURCE	HOURLY RATE FOR CONTRACT PERIOD	HOURLY RATE FOR OPTION PERIOD 1	HOURLY RATE FOR OPTION PERIOD 2
Expert and Strategic Advice Services	To be identified prior to first call-up	\$	\$	\$
Project Management Services	To be identified prior to first call-up	\$	\$	\$
Facilitator Services	To be identified prior to first call-up	\$	\$	\$
Computer and Information Systems Services	To be identified prior to first call-up	\$	\$	\$
Content Development Services	To be identified prior to first call-up	\$	\$	\$
Data Analysis and Reporting Services	To be identified prior to first call-up	\$	\$	\$

B.2 SUBCONTRACTED SERVICES

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

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

B.3 DIRECT EXPENSES

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

The Contractor will be reimbursed for expenses not covered in the Firm Blended Hourly Rate, in certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses are required to complete the Work, such expenses (e.g. expenses for meeting rooms, audio-visual; equipment; translation services and/or printing) may be allowable as direct expenses given the service(s) is/are documented upon approval of the Estimate. These expenses will be reimbursed net of any discounts, with no mark-up, provided the costs are approved in advance by the Project Authority and they are reasonably and properly incurred in carrying out production and advertising services.

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cy019

CCC No./N° CCC - FMS No/ N° VME

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B.4 TRAVEL AND LIVING EXPENSES

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

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

All payments are subject to government audit. Estimated Cost: \$ _____ .

B.5 CONTRACTUAL JOINT VENTURE (IF APPLICABLE)

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

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EN578-133044/A

Amd. No. - N° de la modif.

File No. - N° du dossier

cy019EN578-133044

Buyer ID - Id de l'acheteur

cy019

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

EN578-13-3044

CCC No./N° CCC - FMS No/ N° VME

ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST

Will be provided with any resulting RFSO

ANNEX "D" TECHNICAL AND FINANCIAL EVALUATION

1.1 Technical Evaluation

Stream A: In-Person Stakeholder and Citizen Engagement and Consultation Activities

M.A MANDATORY TECHNICAL CRITERIA

The Offeror must meet all mandatory requirements.

M.A1. The Offeror must submit two (2) consultation project summaries completed* within the last four (4) years (as of bid closing) for in-person stakeholder and citizen engagement and consultation activities that involved the use of the six (6) service categories:

1. Expert and Strategic Advice Services
2. Project Management Services
3. Facilitation Services
4. Logistics Planning Services
5. Content Development Services
6. Data Analysis and Reporting Services

For evaluation purposes, a consultation activity is defined as a two-way flow of information and interactions between participants and the decision-making body. Please refer to the Relevant Terms in Annex E for a complete definition. * A consultation project is considered completed when the report has been provided and approved by the client.

M.A2. The Offeror must provide a minimum of one (1) proposed individual, accompanied by their C.V's. Each proposed individual must meet the following minimum qualifications:

1. Expert and Strategic Advice Services; five (5) years of experience in providing strategic and expert advice for in-person consultation projects;
2. Project Management Services; five (5) years of experience in managing consultation or research projects;
3. Facilitation Services: three (3) years of experience in planning, designing and facilitating in-person sessions with diverse stakeholders;
4. Logistics Planning Services; two (2) years of experience performing logistics planning services;
5. Content Development Services; three (3) years of experience in writing documents to inform and solicit feedback from a variety of stakeholder groups;
6. Data Analysis and Reporting; three (3) years of experience performing quantitative and qualitative data analysis and report writing.

The Offeror may propose the same individual for up to three (3) service categories as long as the individual meets the minimum qualifications for each category they are proposed in.

In addition to the minimum qualifications, the proposed resources must meet the specific requirements below:

- The proposed resource for Facilitation Services must be bilingual or the Offeror must propose a solution for ensuring that all in-person sessions have bilingual capacity;

- The proposed individual (s) for Expert and Strategic Advice and Project Management Services must be either an employee of the Offeror or an employee of one of the Offeror's forming part of a joint venture submitting a bid.

Rated Criteria for Stream A: Services for In-person Stakeholder and Citizen Engagement activities and consultation

Rated Criteria	Maximum Point
R.A1 Previous Experience and project summaries (205 points)	
R.A1.1 Expert and Strategic Advise	60
R.A1.2 Project Management	15
R.A1.3 Content Development	30
R.A1.4 Logistic Planning	45
R.A1.5 Facilitation	15
R.A1.6 Data Analysis and Report Development	30
R.A2 Capabilities of resources in Services (195 points)	
R.A2.1 Expert and Strategic Advice Services	60
R.A2.2 Project Management Services	15
R.A2.3 Facilitation Services	30
R.A2.4 Logistics Planning Services	45
R.A2.5 Content Development Services	15
R.A2.6 Data Analysis and Reporting Services	30
R.A3 Understanding and Approach (100 points)	
R.A3.1 Understanding of GC requirement	20
R.A3.2 Opportunities and challenges	20
R.A3.3 Quality Assurance	30
R.A3.4 Information security management	<u>30</u>
Total:	500

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

R.A1. Previous Experience and project summaries

The Offeror should provide two (2) project summaries for in-person stakeholder and citizen engagement and consultation activities that involved the use of the six service categories identified in M1A and completed* within the past four (4) years, as of the bid closing date.

* A consultation project is considered completed when the report has been provided and approved by the client.

Previous Experience and project summaries will be evaluated based on the following criteria. Each project summary will be evaluated and scored individually; the final score will be compiled to make the criterion total.

R.A1.1 Expert and Strategic Advise**The Offeror:**

- Explained the methodology, techniques and rationale used to meet the project's objectives;
- Demonstrated how the strategy aligned with the project background and the scope;
- Explained the advice recommendations or considerations of the stakeholder environment to meet the project's objectives;
- Described the challenges and solutions encountered during strategic thinking, such as; the advice, recommendations or considerations as how to reached underrepresented groups and/or hard to reach populations, influence of regional context and/or adherence to policies, standards, procedures.

R.A1.2 Project management**The Offeror:**

- Provided work plans and schedules that illustrated the critical path for activities and deliverables
- Explained the process for reporting
- Demonstrated the overall management
- Demonstrated the project was delivered within constraints, on-time and within budget
- Described the challenges and solution in the aspect of change management and control procedures

R.A1.3 Content Development Services**The Offeror:**

- Demonstrated experience in developing a variety of materials/tools
- Identified the extent to which research and analysis were conducted and influence on the production of materials
- Demonstrated experience in the types of materials/tools developed
- Described the challenges and solutions encountered during the production of content development

R.A1.4 Logistics Planning Services

- Described the invitation process
- Demonstrated experience in planning and co-ordinating travel and hospitality arrangements
- Demonstrated experience in providing other logistical services
- Described the challenges and solutions encountered during the logistics planning

R.A1.5 Facilitation Services**The Offeror:**

- Executed facilitation services in French and/or English and in other languages
- Demonstrated experience in the use of a variety of techniques used to generate dialogue
- Described the challenges and solutions encountered during the facilitation services: such as dealing with emerging issues

R.A1.6 Data Analysis and Report Development Services**The Offeror:**

- Demonstrated experience in planning and outlining data collection frameworks
- Demonstrated experience in performing quantitative and qualitative analysis.
- Described the challenges and solutions encountered regarding the production of reports and type of reports.

Previous Experience and Project Summaries – Example Template

The Offeror should: use the heading and subheading provided below: use plain language; provide facts and sources.

SECTION I: BACKGROUND INFORMATION

Company Name:

Client Name:

Project Name:

Project Start and End Dates:

SECTION II: STRATEGIC THINKING

Describe how the expert and strategic advice on the design, development and implementation of the stakeholder and citizen engagement strategy, approaches and plans responded to your client's objectives. This should include: description of the project background, summary of proposed methodology (ies) with rationale and techniques used; scope of project, analysis of stakeholder environment, challenges and solutions, such as: how regional context may have influenced the development of consultation material, any strategy to reach underrepresented groups/hard to reach populations, adherence to policies, standards.

SECTION III: PROJECT MANAGEMENT Describe how project management was carried out, including the provision of a workplan and schedule detailing the timelines of deliverables and services, reporting on progress, challenges and solutions, managing overall team, tasks, deadlines and budget.

SECTION IV: PROJECT EXECUTION

Content Development:

Describe the type of research and analysis undertaken to prepare consultation material, the type(s) of the materials developed, any challenges encountered to produce any or all documents related to the stakeholder or citizen engagement consultation activity and solutions

Logistics Planning:

Describe how logistical arrangements were carried out, including the participant invitation process, how consent was formulated and obtained, how travel and hospitality arrangements were undertaken, other related logistical services support provided as described in the SOW, and challenges and solutions, such as communicating and obtaining consent, adhering to specific policies and procedures.

Facilitation Services:

Describe how the facilitation services were provided in both official languages* and how the format and materials met the objectives of the requirement. This should include a description of techniques used to generate dialogue, services and deliverables provided, such as the production of a facilitator and/or participant guide, any challenges and solutions, such as consideration of regional context, consideration and approach appropriate to the group consulted, any adjustments, and record/note taking services,

* If the facilitation services were provided in only English or French, the Offeror must demonstrate their ability to provide facilitation services in both official languages.

SECTION V: DATA ANALYSIS AND DEVELOPMENT SERVICE Describe how the data analysis and report development was carried out, including a description of the analysis methodology used, and types of reports prepared.

R.A2. Capabilities of Resources in Service Categories

For each of the six categories of services below, the Offeror should provide a C.V for each proposed individual who will be assigned to work on Government of Canada consultations. Only those individuals who meet the minimum qualifications for each category of service they are proposed in (described in **M.A2**) will be evaluated.

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

Categories of Services

R.A2.1 Expert and Strategic Advice Services

R.A2.2 Project Management Services

R.A2.3 Facilitation Services

R.A2.4 Logistics Planning Services

R.A2.5 Content Development Services

R.A2.6 Data Analysis and Reporting Services

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

1. the category of service for which the individual is being proposed;
2. the number of years of experience in the proposed category of service;
3. effort to maintain/upgrade their professional skills and knowledge related to engagement (accreditation and professional development);
4. proficiency in English and French; and
5. two (2) examples of projects in the last three (3) years (as of bid closing date) that demonstrate the individual's expertise in their field. Each example should provide details on the scope and size of the project and the individual's role and contribution.

R.A3. Understanding and Approach

The Offeror should include in its offer a comprehensive statement that:

R.A3.1 Describes the processes and approaches to ensure that services and deliverables will be provided in accordance with relevant Government of Canada acts, codes, regulations and policies as detailed in annex "A2" Statement of Work, section 2.2, Specifications and Standards.

R.A3.2 Describes the opportunities and challenges in providing in-person stakeholder and citizen engagement and consultation activities adhering to GC requirements.

R.A3.3 Describes the systems and processes that are in place to manage in-person consultation projects that may require the use of the same resources, how resources are assigned to projects, how timelines are managed, and the Offerors approach to quality assurance.

R.A3.4 Describes the systems and processes that are in place to manage information security, including: general security (e.g. personnel, site, assets, etc), data protection (e.g. data segregation methods, data cleansing practices, etc), Internal security (e.g. handling of sensitive information, networks and communications security) and quality assurance as detailed in annex "A2" Statement of Work, section 2.2, Specifications and Standards.

M.B. Stream B: Online Stakeholder and Citizen Engagement and Consultation Activities

M.B. MANDATORY TECHNICAL CRITERIA

The Offeror must meet all mandatory requirements.

M.B1. The Offeror must submit two (2) consultation project summaries completed* within the last four (4) years (as of bid closing) for online stakeholder and citizen engagement and consultation activities that involved the use of the six (6) service categories:

1. Expert and Strategic Advice Services
2. Project Management Services
3. Computer and Information Systems Services
4. Facilitation Services
5. Content Development Services
6. Data Analysis and Reporting Services

For evaluation purposes an online consultation activity is defined as a two-way flow of information and interactions between participants and the decision-making body using Web 2.0 tools and technologies. Please refer to the Relevant Terms in Annex E for a complete definition.* A consultation project is considered completed when findings have been provided and approved by the client.

M.B2. The Offeror must provide a minimum of one (1) proposed individual, accompanied by their C.V's. Each proposed individual must meet the following minimum qualifications:

1. Expert and Strategic Advice Services; five (5) years of experience in providing strategic and expert advice on consultation or research projects and must have demonstrated experience and knowledge in the use and application of Web 2.0 Technologies;
2. Project Management Services; five (5) years of experience managing IT, consultation or research projects;
3. Computer and Information Systems Services; two (2) years of experience in web development, web-based application development, and demonstrated experience and knowledge of W3C Web Standards;
4. Facilitation Services; three (3) years of experience in the planning, designing and facilitating of electronic/online sessions with diverse stakeholders;
5. Content Development Services; three (3) years of experience in writing documents for the web to inform and solicit feedback from a variety of stakeholder groups;
6. Data Analysis and Reporting Services; three (3) years of experience in performing quantitative and qualitative data analysis and in drafting various types of reports.

The Offeror may propose the same individual for up to three (3) service categories as long as the individual meets the minimum qualifications for each category they are proposed in.

In addition to the minimum qualifications, the proposed resources must meet the specific requirements below:

- The proposed resource for Facilitation Services must be bilingual or the Offeror must propose a solution for ensuring that all online interactions have bilingual capacity;

- The proposed resource(s) for Expert and Strategic Advice and Project Management Services must be either an employee of the Offeror or an employee of one of the Offeror's forming part of a joint venture submitting a bid.

M.B3. The Offeror must demonstrate its ability to comply with GC Web Standards in the development of an online consultation by submitting* one (1) of the following with the source codes:

- Two (2) pages of an existing online consultation** ; or
- develop a two (2) page online consultation** project.

The web pages submitted must meet all WGAC success criteria as described at:

<http://www.tbs-sct.gc.ca/ws-nw/wa-aw/wa-aw-assess-methd-eng.asp>

* Web pages and source codes MUST be submitted on USB or CD format. The http link will NOT be accepted.

** examples of acceptable online consultation projects include the following;online consultation workbooks, online discussion groups or dialogues, factual/behavioural-based questionnaires, and chat rooms, wikis, blogs, issues forums, crowdsourcing, etc. Please refer to the Relevant Terms in Annex E for a complete definition.

R.B. Rated Criteria for Stream B: Services for Online Stakeholder and Citizen Engagement activities and consultation

Rated Criteria	Maximum Point
R.B1 Previous Experience and project summaries (205 points)	
R.B1.1 Expert and Strategic Advise	65
R.B1.2 Project Management	30
R.B1.3 Development of Online project	45
R.B1.4 Execution of Online Stakeholder and Citizen Engagement Activity	30
R.B1.5 Data Analysis and Report Development	35
R.B2 Capabilities of resources in Services (195 points)	
R.B2.1 Expert and Strategic Advice Services	60
R.B2.2 Project Management Services	15
R.B2.3 Content Development Services	30
R.B2.4 Computer and Information Systems	45
R.B2.5 Facilitation Services	15
R.B2.6 Data Analysis and Reporting Services	30
R.A3 Understanding and Approach (100 points)	
R.A3.1 Understanding of GC requirement	20
R.A3.2 Opportunities and challenges	20
R.A3.3 Quality Assurance	30
R.A3.4 Information security management	<u>30</u>
Total:	500

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

R.B1. Previous Experience and Project Summaries

The Offeror should provide two (2) project summaries for online stakeholder and citizen engagement and consultation activities that involved the use of the six service categories identified in M.1.B and completed* within the past four (4) years, as of the bid closing date.

*A consultation project is considered completed when the report has been provided and approved by the client.

Previous Experience and Project Summaries will be evaluated based on the following criteria. Each project summary will be evaluated and scored individually; the final score will be compiled to make the criterion total.

R.B1.1 Strategic Thinking

The Offeror:

- Explained the methodology, techniques and rationale used to meet the project's objectives;
- Demonstrated how the strategy aligned with project background and the scope;
- Explained the advice, recommendations or considerations of the stakeholder environment to meet the project's objectives;
- Described the challenges and solutions encountered during strategic thinking, such as; the advice, recommendations or considerations as how to reach underrepresented groups and/or hard to reach populations, influence of regional context and/or adherence to policies, standards, procedures;
- Explained the accommodation and participation strategy

R.B1.2 Project Management

The Offeror:

- Provided work plans and schedules that illustrated the critical path for activities and deliverables;
- Explained the process for reporting;
- Demonstrated the overall management, including monitoring web analytics and any adjustments made as a result;
- Demonstrated the project was delivered within constraints, on-time and within budget;
- Described the challenges and solution in the aspect of change management and control procedures

R.B1.3 Development of the Online Presence

The Offeror:

- Demonstrated experience in developing a variety of materials/tools to support the consultations;
- Demonstrated development of the online presence;
- Explained the process and element for testing online presence;
- Explained the processes and capabilities to support troubleshooting and technical support;
- Explained how the information was kept secure (information security);
- Described how the pilot test was conducted

R.B1.4 Execution of Online Stakeholder and Citizen Engagement Activity

The Offeror:

- Demonstrated the facilitator's role during the consultation;
- Demonstrated how the rules of engagement were applied;
- Described the approach to translation services for online consultations

R.B1.5 Data Analysis and Report Development Services

The Offeror:

- Demonstrated experience in planning and outlining data collection frameworks
- Demonstrated experience in performing quantitative and qualitative analysis.
- Described the challenges and solutions encountered regarding the production of reports and type of reports.

Previous Experience and Project Summaries – Example Template

The Offeror should: use the heading and sub-heading provided below: use plain language; provide facts and sources.

SECTION I: BACKGROUND INFORMATION

Company Name:

Client Name:

Project Name:

Project Start and End Dates:

SECTION II: STRATEGIC THINKING

Describe how the expert and strategic advice on the design, development and implementation of the stakeholder and citizen engagement strategies, approaches and plans responded to your client's and project objectives. This should include: summary of recommendations of suitable online consultation processes, tools, platforms and/or web presence to meet the consultation/engagement objectives with rationale; analysis of stakeholder environment, participation strategy indicating how individuals will participate in the consultation, including hard to reach population segments; challenges and solutions.

SECTION III: PROJECT MANAGEMENT

Describe how project management was carried out, including the provision of a workplan and schedule detailing the timelines of deliverables and services, implementing the plan, reporting on progress, challenges and solutions, managing overall team, tasks, deadlines and budget.

SECTION IV: PROJECT DEVELOPMENT AND EXECUTION

Content Development:

Describe the type of research and analysis undertaken to prepare online consultation materials, the type(s) of materials developed, any challenges encountered to produce any or all documents related to the online stakeholder or citizen engagement and consultation activity, including how participant consent is obtained and privacy rights are communicated and included in the development of all online activities and solutions.

Development and Implementation of Online Presence:

Describe the type of web presence and tools developed to support the objectives of the project, including challenges and solutions in the development of the design, development, implementation, programming, and testing of online tools and database development.

Testing of the Online Presence:

Describe the process for testing the online presence, including user acceptance, functionality, security and load testing, testing of live environment, whether a pilot test with limited audience was conducted, and any remedial actions/debugging phase to ensure quality of coding.

Execution of Online Stakeholder and Citizen Engagement Activity:

Describe how the online consultation was executed which should include how moderation was conducted, the role of the moderator, the schedule for intervention, the application of rules of engagement, whether translation of information was provided, and if so, how the service was provided; how web analytics were

monitored any whether adjustments were made, and how the information was collected, stored, maintained, and protected during the consultation process, how technical support was provided to the client and to participants.

SECTION V : DATA ANALYSIS AND DEVELOPMENT SERVICE

Describe how the data analysis and reporting was carried out, which should include data analysis methods and frameworks, tools and software used, challenges and solutions and types of reports prepared.

R.B2.Capabilities of Resources in Service Categories

For each of the six service categories below, the Offeror should provide a C.V for each proposed individual who will be assigned to work on Government of Canada consultations. Only those individuals who meet the minimum qualifications for each service category they are proposed in (described in **M.B2**) will be evaluated.

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

Categories of Services

R.B2.1 Expert and Strategic Advice Services

R.B2.2 Project Management Services

R.B2.3 Facilitation Services

R.B2.4 Computer and Information Systems Services

R.B2.5 Content Development Services

R.B2.6 Data analysis and Reporting Services

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

1. the category of service for which the individual is being proposed;
2. the number of years of experience in the proposed category of service;
3. effort to maintain/upgrade their professional skills and knowledge related to engagement (accreditation and professional development);
4. proficiency in English and French; and
5. two (2) examples of projects in the last three (3) years (as of bid closing date) that demonstrate the individual's expertise in their field. Each example should provide details on the scope and size of the project and the individual's role and contribution.

R.B3. Understanding and Approach

The Offeror should include in its offer a comprehensive statement that:

R.B3.1. Describes the processes and approaches to ensure that the services and deliverables will be provided in accordance with relevant Government of Canada acts, codes, regulations and policies as detailed in annex "A3" Statement of Work, section 2.2, Specifications and Standards.

R.B3.2. Describes the opportunities and challenges in providing online stakeholder and citizen engagement and consultation activities adhering to GC requirements.

R.B3.3. Describes the systems and processes that are in place to manage consultation projects including how resources are assigned to projects, how timelines are managed, controlled and the Offerors approach to quality assurance.

R.B3.4. Describes the systems and processes that are in place to manage information security, including: general security (e.g. personnel, site, assets, etc), data protection (e.g. data segregation methods, data cleansing practices, etc,) internal security (e.g. handling of sensitive information, networks and communications security) and quality assurance as detailed in annex "A3" Statement of Work, section 2.2, Specifications and Standards.

1.2 Financial Evaluation

1.2.1 FINANCIAL EVALUATION

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

The financial scores will be calculated as follows:

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

Example of Step 1:

Firm A

Category of Service	HOURLY RATE FOR INITIAL 2-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Expert and Strategic Advice	\$160.00	\$160.00	\$160.00	\$160.00
Project Management	\$160.00	\$165.00	\$170.00	\$165.00
Facilitation	\$180.00	\$185.00	\$190.00	\$185.00
Logistics Planning OR Computer and Information Systems	\$190.00	\$195.00	\$200.00	\$195.00
Content Development	\$180.00	\$185.00	\$190.00	\$185.00
Data Analysis and Reporting	\$180.00	\$185.00	\$190.00	\$185.00

Firm B

Category of Service	HOURLY RATE FOR INITIAL 2-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Expert and Strategic Advice	\$175.00	\$180.00	\$185.00	\$180.00
Project Management	\$180.00	\$185.00	\$190.00	\$185.00
Facilitation	\$200.00	\$205.00	\$210.00	\$205.00
Logistics Planning OR Computer and Information Systems	\$170.00	\$175.00	\$180.00	\$175.00
Content Development	\$160.00	\$165.00	\$170.00	\$165.00
Data Analysis and Reporting	\$170.00	\$175.00	\$180.00	\$175.00

Firm C

Category of Service	HOURLY RATE FOR INITIAL 2-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Expert and Strategic Advice	\$320.00	\$325.00	\$330.00	\$325.00
Project Management	\$330.00	\$335.00	\$340.00	\$335.00
Facilitation	\$345.00	\$350.00	\$355.00	\$350.00
Logistics Planning OR Computer and Information Systems	\$330.00	\$335.00	\$340.00	\$335.00
Content Development	\$330.00	\$330.00	\$330.00	\$330.00
Data Analysis and Reporting	\$330.00	\$330.00	\$330.00	\$330.00

Firm D

Category of Service	HOURLY RATE FOR INITIAL 2-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Expert and Strategic Advice	\$375.00	\$380.00	\$380.00	\$380.00
Project Management	\$420.00	\$425.00	\$430.00	\$425.00
Facilitation	\$385.00	\$390.00	\$395.00	\$390.00
Logistics Planning OR Computer and Information Systems	\$355.00	\$360.00	\$365.00	\$360.00
Content Development	\$355.00	\$360.00	\$365.00	\$360.00
Data Analysis and Reporting	\$355.00	\$360.00	\$365.00	\$360.00

Firm E

Category of Service	HOURLY RATE FOR INITIAL 2-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Expert and Strategic Advice	\$45.00	\$50.00	\$55.00	\$50.00
Project Management	\$65.00	\$70.00	\$75.00	\$70.00
Facilitation	\$55.00	\$60.00	\$65.00	\$60.00
Logistics Planning OR Computer and Information Systems	\$35.00	\$40.00	\$45.00	\$40.00
Content Development	\$35.00	\$40.00	\$45.00	\$40.00
Data Analysis and Reporting	\$55.00	\$60.00	\$65.00	\$60.00

Step 2: The highest and lowest average hourly rate per category of service will be removed prior to calculating the overall average rate per category. If there are three or fewer offerors, no hourly rates will be removed.

Example of Step 2:

Offeror	Expert and Strategic Advice	Project Management	Facilitation	Logistics Planning OR Computer/ Information Systems	Content Development	Data Analysis and Reporting
FIRM A	\$60.00	\$165.00	\$185.00	\$195.00	\$185.00	\$185.00
FIRM B	\$180.00	\$185.00	\$205.00	\$175.00	\$165.00	\$175.00
FIRM C	\$325.00	\$335.00	\$350.00	\$335.00	\$330.00	\$330.00
FIRM D	\$380.00	\$425.00	\$390.00	\$360.00	\$360.00	\$360.00
FIRM E	\$50.00	\$70.00	\$60.00	\$40.00	\$60.00	\$40.00
OVERALL AVERAGE	\$221.67	\$228.33	\$246.67	\$235.00	\$226.64	\$230.00

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

Example of Step 3:

Offeror	Expert and Strategic Advice	Project Management	Facilitation	Logistics Planning OR Computer/ Information Systems	Content Development	Data Analysis and Reporting
FIRM A	\$160.00	\$165.00	\$185.00	\$195.00	\$185.00	\$185.00
FIRM B	\$180.00	\$185.00	\$205.00	\$175.00	\$165.00	\$175.00
FIRM C	\$325.00	\$335.00	\$350.00	\$335.00	\$330.00	\$330.00
FIRM D	\$380.00	\$425.00	\$390.00	\$360.00	\$360.00	\$360.00
FIRM E	\$50.00	\$70.00	\$60.00	\$40.00	\$60.00	\$40.00
OVERALL AVERAGE	\$221.67	\$228.33	\$246.67	\$235.00	\$226.67	\$230.00
Maximum Responsive Hourly Rate	\$443.33	\$456.67	\$493.33	\$470.00	\$453.33	\$460.00
Minimum Responsive Hourly Rate	\$110.83	\$114.17	\$123.33	\$117.50	\$113.33	\$115.00

The Offer from Firm E would be non-responsive as they did not meet the minimum responsive hourly rate.

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

Example of Step 4:

Lowest Responsive Hourly Rate X 5 = Weighted Financial Score per Category
Offeror's Hourly Rate

Offeror	Expert and Strategic Advice	Weighted Financial Score
FIRM A	\$160.00	5.00
FIRM B	\$180.00	4.44
FIRM C	\$325.00	2.46
FIRM D	\$380.00	2.11

Offeror	Project Management	WEIGHTED FINANCIAL SCORE
FIRM A	\$165.00	5.00
FIRM B	\$185.00	4.46
FIRM C	\$335.00	2.46
FIRM D	\$425.00	1.94

Offeror	Facilitation	WEIGHTED FINANCIAL SCORE
FIRM A	\$185.00	5.00
FIRM B	\$205.00	4.51
FIRM C	\$350.00	2.64
FIRM D	\$390.00	2.37

Offeror	Logistics Planning Services/ Computer/ Information Systems	WEIGHTED FINANCIAL SCORE
FIRM A	\$195.00	5.00
FIRM B	\$175.00	4.49
FIRM C	\$350.00	2.50
FIRM D	\$360.00	2.43

Offeror	Content Development Services	WEIGHTED FINANCIAL SCORE
FIRM A	\$185.00	5.00
FIRM B	\$175.00	4.46
FIRM C	\$330.00	2.50
FIRM D	\$360.00	2.29

Offeror	Data Analysis and Reporting Services	WEIGHTED FINANCIAL SCORE
FIRM A	\$195.00	5.00
FIRM B	\$175.00	4.73
FIRM C	\$335.00	2.65
FIRM D	\$360.00	2.43

Solicitation No. - N° de l'invitation

EN578-133044/A

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

EN578-13-3044

Amd. No. - N° de la modif.

File No. - N° du dossier

cy019EN578-133044

Buyer ID - Id de l'acheteur

cy019

CCC No./N° CCC - FMS No/ N° VME

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

Example of Step 5:

Offeror	Expert and Strategic Advice	Project Management	Facilitation	Logistics Planning OR Computer/ Information Systems	Content Development	Data Analysis and Reporting	TOTAL SCORE
FIRM A	5.00	5.00	5.00	5.00	5.00	5.00	30.00
FIRM B	4.44	4.46	4.51	4.49	4.46	4.73	27.09
FIRM C	2.46	2.46	2.64	2.50	2.50	2.65	15.22
FIRM D	2.11	1.94	2.37	2.43	2.29	2.43	13.57

ANNEX "D.1" EVALUATION GRID

TECHNICAL EVALUATION – MANDATORY REQUIREMENTS

Evaluation Criteria	Met	Not met	Reference	Offeror explanation of how the criteria is met
In accordance with M.A1 and M.B1, two consultation project summaries submitted.				
In accordance with M.A2, CV provided for each proposed resource by service category. Minimum of one (1) resource per service category: : <ul style="list-style-type: none"> ▪ Expert and Strategic Advice Services; ▪ Project Management Services; ▪ Facilitation Services; ▪ Logistics Planning Services; ▪ Content Development Services; and ▪ Data Analysis and Reporting Services ▪ 	<input type="checkbox"/>	<input type="checkbox"/>		
The proposed resource for Facilitation Services must be bilingual or the Offeror must propose a solution for ensuring that all in-person sessions have bilingual capacity;	<input type="checkbox"/>	<input type="checkbox"/>		
The proposed resources(s) for Expert and Strategic Advice and Project Management Services must be either an employee of the Offeror or an employee of one of the Offeror's forming part of a joint venture submitting a bid.	<input type="checkbox"/>	<input type="checkbox"/>		
In accordance with M.B2, CV provided for each proposed resource by service category. Minimum of one (1) resource per service category: <ul style="list-style-type: none"> ▪ Expert and Strategic Advice Services; ▪ Project Management Services; ▪ Facilitation Services; ▪ Computer and Information Systems Services; ▪ Content Development Services; and ▪ Data Analysis and Reporting Services ▪ 	<input type="checkbox"/>	<input type="checkbox"/>		
The proposed resource for Facilitation Services must be bilingual or the Offeror must propose a solution for ensuring that all in-person sessions have bilingual capacity;	<input type="checkbox"/>	<input type="checkbox"/>		
The proposed resources(s) for Expert and Strategic Advice and Project Management Services must be either an employee of the Offeror or an employee of one of the Offeror's forming part of a joint venture submitting a bid.	<input type="checkbox"/>	<input type="checkbox"/>		
In accordance with M.B3 The Web pages and source codes submitted will be evaluated as follows:				
WCAG 2.0 Success Criteria Checklist (12 Guidelines, 38 Success Criteria)				
Principle: Perceivable Guideline 1.1 Text Alternatives: Provide text alternatives for any non-text content so that it can be changed into other forms people need, such as large print, braille, speech, symbols or simpler language.				

1. 1.1.1 Non-text content (Level A)**Guideline 1.2 Time-based Media: Provide alternatives for time-based media.**

1. 1.2.1 Audio-only and Video-only (Prerecorded) (Level A)
2. 1.2.2 Captions (Prerecorded) (Level A)
3. 1.2.3 Audio Description or Media Alternative (Prerecorded) (Level A)
4. 1.2.4 Captions (Live) (Level AA)
5. 1.2.5 Audio Description (Prerecorded) (Level AA)

Guideline 1.3 Adaptable: Create content that can be presented in different ways (for example simpler layout) without losing information or structure.

1. 1.3.1 Info and Relationships (Level A)
2. 1.3.2 Meaningful Sequence (Level A)
3. 1.3.3 Sensory Characteristics (Level A)

**Guideline 1.4 Distinguishable: Make it easier for users to see and hear content including separating foreground from background.**

1. 1.4.1 Use of Color (Level A)
2. 1.4.2 Audio Control (Level A)
3. 1.4.3 Contrast (Minimum) (Level AA)
4. 1.4.4 Resize text (Level AA)
5. 1.4.5 Images of Text (Level AA)

Principle: Operable**Guideline 2.1 Keyboard Accessible: Make all functionality available from a keyboard.**

1. 2.1.1 Keyboard (Level A)
2. 2.1.2 No Keyboard Trap (Level A)

Guideline 2.2 Enough Time: Provide users enough time to read and use content.

1. 2.2.1 Timing Adjustable (Level A)
2. 2.2.2 Pause, Stop, Hide (Level A)

Guideline 2.3 Seizures: Do not design content in a way that is known to cause seizures.

1. 2.3.1 Three Flashes or Below Threshold (Level A)

Guideline 2.4 Navigable: Provide ways to help users navigate, find content, and determine where they are.

1. 2.4.1 Bypass Blocks (Level A)
2. 2.4.2 Page Titled (Level A)
3. 2.4.3 Focus Order (Level A)
4. 2.4.4 Link Purpose (In Context) (Level A)
5. 2.4.5 Multiple ways (Level AA)
6. 2.4.6 Headings and Labels (Level AA)
7. 2.4.7 Focus Visible (Level AA)

Principle: Understandable**Guideline 3.1 Readable: Make text content readable and understandable.**

1. 3.1.1 Language of Page (Level A)
2. 3.1.2 Language of Parts (Level AA)

Guideline 3.2 Predictable: Make Web pages appear and operate in predictable ways.

1. 3.2.1 On Focus (Level A)
2. 3.2.2 On Input (Level A)
3. 3.2.3 Consistent Navigation (Level AA)
4. 3.2.4 Consistent Identification (Level AA)

<p>Guideline 3.3 Input Assistance: Help users avoid and correct mistakes.</p> <ol style="list-style-type: none"> 1. <u>3.3.1</u> Error Identification (Level A) 2. <u>3.3.2</u> Labels or Instructions (Level A) 3. <u>3.3.3</u> Error Suggestion (Level AA) 4. <u>3.3.4</u> Error Prevention (Legal, Financial, Data) (Level AA) <p>Principle: Robust</p> <p>Guideline 4.1 Compatible: Maximize compatibility with current and future user agents, including assistive technologies.</p> <ol style="list-style-type: none"> 1. <u>4.1.1</u> Parsing (Level A) 2. <u>4.1.2</u> Name, Role, Value (Level A) 					
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R.A1. Stream A – Services for In-person Stakeholder and Citizen Engagement and Consultation Activities
(maximum of 205 points)

D2.A1. Previous Experience and Project Summaries

What we are looking for:

Demonstration that the Offeror has undertaken the development, planning and implementation of in-person stakeholder and citizen engagement and consultation activities using appropriate methods and techniques as well as conducting the appropriate analysis and reporting.

R.A1.1. Expert and Strategic Advise - 60 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Engagement Strategy: recommendations on methodologies, techniques and rationale for the approach.	6	No information provided on how the Strategy was developed	Some information is provided on how the Strategy was developed. Does not clearly explain the methodology, techniques and rationale for the approach to meet the project's objectives.	Complete information is provided on how the Strategy was developed. Clearly explains how the methodology, techniques and rationale for the approach met the project's objectives.
Project background and scope:	6	No information on the background of the project and scope was provided.	Some information is provided on the background of the project and scope. Does not clearly demonstrate that the Strategy is aligned with the project background and scope.	Complete information is provided on the background of the project and scope. Clearly demonstrates the alignment with the Strategy.
Analysis of Stakeholder Environment:	8	No information on the analysis of the stakeholder environment was provided.	Some information is provided on the analysis of stakeholder. Does not clearly explain the advice, recommendations or considerations of the stakeholder environment to meet the project's objectives	Complete information is provided on the analysis of the stakeholder environment. Clearly explains the advice, recommendations or considerations of the stakeholder environment to meet the project's objectives.
Challenges and Solutions:	10	No information provided on challenges and solutions.	Some information provided on challenges and solutions. Does not clearly explain advice, recommendations or considerations such as how	Complete information provided on challenges and solutions. Clearly explains the advice, recommendations or considerations such as how

			to reach underrepresented groups and/or hard to reach populations, influence of regional context, and/or adherence to policies, standards, procedures, Information is incomplete or unclear.	to reach underrepresented groups and/or hard to reach populations, influence of regional context and/or adherence to policies, standards, procedures, Information is complete and clear.
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R.A1.2. Project Management - 30 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Work Plan and Detailed Schedules	2	No information on Work Plans and detailed schedules was provided.	Some information on Work Plans and Schedules provided but did not demonstrate thorough timelines and lacked information	Complete information provided on Work Plans and Schedules provided and illustrates a thorough critical path for activities and deliverables.
Reporting on Progress	2	No information provided on progress reporting.	Some information provided on progress reporting but lacks depth.	Complete information provided on progress reporting. Demonstrates thoroughness.
Overall team management	2	Not described	Not fully described. Did not demonstrate how managing human resources contributed to the successful completion of the consultation project.	Complete information provided and clearly demonstrates how the management of human resources contributed to the successful completion of the consultation project
Project was delivered within constraints, on-time and within budget	4	No indication that the project was delivered within constraints, on-time and within budget.	Does not clearly demonstrate that the project was delivered within constraints, on-time and within budget.	Information provided demonstrates that the project was delivered within constraints, on-time and within budget.
Challenges and Solutions	5	No information provided on challenges and solutions encountered while managing the project.	N/A	Information provided describing all aspects of change management and control procedures.

R.A1.3 Content Development Services - 30 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Research and Analysis to prepare consultation materials/tools.	3	No information provided on research and analysis undertaken in order to prepare consultation material/tools.	Some information provided. Lacks depth of research and analysis and how it influenced the production of material.	Complete information provided. Thorough demonstration of the extent of research and analysis conducted and how it influenced the production of material.
Types of materials/tools developed	4	No information provided on types of materials/tools developed.	Some information provided. Demonstrates a narrow scope of the types of materials/tools developed to support the consultation.	Complete information. Demonstrates a broad production of the types of materials/tools developed to support the consultations
Challenges and Solutions	8	No information provided on challenges and solutions.	N/A	Information provided on challenges and solutions encountered during the production of content development.

R.A1.4 Logistics Planning Services - 55 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Invitation process	5	No information provided.	Some elements provided regarding the Invitation process. The information provided demonstrates basic tasks.	Invitation process includes complex elements; multiple participants, diverse locations; protocol for dignitaries. The information provided demonstrates extensive Experience and complex
Travel and hospitality arrangement	5	No information provided	Some information provided on how travel and hospitality arrangements were carried-out. The information provided demonstrates basic knowledge and experience in planning and coordinating travel and hospitality arrangements.	Complete information provided on how travel and hospitality arrangements were carried-out demonstrates extensive knowledge and experience in planning and coordinating Travel and hospitality arrangements
Other logistical services	7.5	No description of other logistical services described.	N/A	Information provided demonstrates the provision of other logistical services.
Challenges and Solutions	10	No information provided.		Challenges and solutions identified such as: communicating and obtaining consent, unexpected and emerging issues.

R.A1.5 Facilitation Services - 35 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Language capability	4	No experience in executing facilitation services in French and/or English and one other language.	Some information provided in executing facilitation services in French and/or English and one other language.	Complete information provided demonstrating extensive experience in executing facilitation services in French and/or English and one other language.
Variety of techniques used to generate dialogue	5.5	No information provided on techniques used to generate dialogue.	Information provided demonstrates use of some techniques.	Information provided demonstrates the use of a variety of techniques used to generate dialogue.
Challenges and Solutions	8	No information provided on challenges and solutions.	N/A	Information provided demonstrates the ability to adjust to deal with emerging issues.

R.A1.6 Data Analysis and Report Development Services - 35 Points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Planning and outlining data collection methods	4	Not described or no experience	The information does not fully demonstrate experience in planning and outlining data collection methods. Lacks details.	The information provided fully demonstrates experience in planning and outlining data collection.
Performing quantitative and qualitative analysis		Not described or no experience	The information provided demonstrates basic	The information provided demonstrates extensive

	5.5		experience in performing quantitative and qualitative analysis and lacks detail on the type of analysis performed.	experience in performing quantitative and qualitative analysis and provides thorough details on the type of analysis performed.
Challenges and Solutions regarding the production of reports and type of reports	8	Not described or no experience	Information provided describes some challenges and solutions as well as illustrates the firm's capability of producing a limited range of types of reports.	Information provided describes various challenges and solutions as well as illustrates the firm's capability of producing a variety of reports.

R.A2. Capabilities of Resources in Service Categories (maximum of 195 points)

R.A2.1 Expert and Strategic Advice Services - 60 points

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in providing strategic and expert advice on consultation or research projects	6	CV not provided; <u>or</u> no experience.	CV provided; <u>5 to 6 years' experience.</u>	CV provided; <u>7 to 8 years' experience.</u>	CV provided; <u>over 9 years' experience.</u>
Formal education,	3	CV not provided; <u>or</u> no formal education.	CV provided; Post-secondary diploma in social sciences or public administration or related field from a recognized academic institution.	N/A	CV provided; University degree in social sciences or public administration or related field from a recognized academic institution.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	3	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	8	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution.	CV provided; demonstrates extensive expertise through their role and contribution.

R.A2.2 Project Management Services - 15 points

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in managing consultation or research projects.	1.5	CV not provided; <u>or</u> no experience.	CV provided; <u>5 to 6 years' experience.</u>	CV provided; <u>7 to 9 years' experience.</u>	CV provided; <u>as over 10 years' experience.</u>
Formal education,	.75	CV not provided; <u>or</u> no formal education.	CV provided; Post-secondary diploma/degree from	N/A	CV provided; University degree from a recognized

			a recognized academic institution.		academic institution and
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	.75	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement . PMP Designation.
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	2	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution.	CV provided; demonstrates extensive expertise through their role and contribution.

R.A2.3 Facilitation Services - 30 points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in planning, designing and facilitating sessions with diverse stakeholders	3	CV not provided; <u>or</u> no experience	CV provided; <u>2 to 5 years' experience</u>	CV provided; <u>6 to 9 years' experience</u>	CV provided; <u>over 10 years' experience</u>
Relevant combined formal education, accreditation and professional development	1.5	CV not provided; <u>or</u> no formal education	CV provided; Post-secondary diploma/degree from a recognized academic institution	CV provided; Post-secondary diploma/degree AND training in facilitation.	CV provided; Post-secondary diploma/degree AND training in facilitation AND certification in facilitation.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	1.5	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	4	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V	CV provided; demonstrates extensive expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V

R.A2.4 Logistics Planning Services - 45 points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience as a logistic planner.	4	CV not provided; <u>or</u> no experience	CV provided; <u>2 to 3 years' experience</u>	CV provided; <u>4 to 5 years' experience</u>	CV provided; as <u>over 6 years'</u>

					experience as a logistics planner.
Formal education	2	CV not provided; or no formal education.	CV provided; post-secondary course in related field from a recognized academic institution	N/A	CV provided; Post secondary diploma/degree from a recognized academic institution,
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	2	CV not provided or no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	7	CV not provided or no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution.	CV provided; demonstrates extensive expertise through their role and contribution.

R.A2.5 Content Development Services - 15 points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in writing documents to inform and solicit feedback from a variety of stakeholder groups.	1.5	CV not provided; or no experience in	CV provided; 3 to 5 years' experience	CV provided; 6 to 7 years' experience	CV provided; over 8 years' experience
Formal education,	.75	CV not provided; or no formal education.	CV provided; post-secondary diploma/degree in communications, literature or related field from a recognized academic institution	N/A	CV provided; University degree in communications, literature or related field from a recognized academic institution
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	.75	CV not provided or no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	2	CV not provided or no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution.	CV provided; demonstrates extensive expertise through their role and contribution.

R.A2.6 Data Analysis and Reporting Services - 30 points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
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Number of years of experience performing quantitative and qualitative data analysis and report development	3	CV not provided; <u>or</u> no experience	CV provided; 3 to 4 years' experience	CV provided; 5 to 6 years' experience	CV provided; over 7 years' experience
Formal education,	1.5	CV not provided; <u>or</u> no formal education	CV provided; Post-secondary diploma/degree in social sciences or related field from a recognized academic institution	N/A	CV provided; University degree in social sciences or related field from a recognized academic institution.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	1.5	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	4	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution.	CV provided; demonstrates extensive expertise through their role and contribution

R.A3. Understanding and Approach (maximum of 100 points)

R.A3.1 Understanding of Government of Canada requirement - 20 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Processes and approach to ensure compliance with GC acts, codes, regulations and policies	10	Not provided	Information provided does not clearly demonstrate the Offeror's processes and approaches in ensuring that services are delivered in accordance with the GC acts, codes, regulations and policies.	All information provided is complete. Information provided clearly demonstrates the Offeror's processes and approaches in ensuring that services are delivered in accordance with the GC acts, codes, regulations and policies.

R.A3.2 Opportunities and challenges - 20 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Opportunities and challenges in providing in-person stakeholder and citizen engagement and consultation activities	10	Not provided	Opportunities and challenges are identified but not fully described; GC requirements not fully understood. Not clearly adhering to GC requirements	Opportunities and challenges are identified and fully described. GC requirements fully understood. Clearly adhering to GC requirements

R.A3.3 Quality Assurance - 30 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Resource management		No description of how the	Information provides a basic understanding and	Information provides an in-depth understanding and

	5	resources are assigned to projects and managed	does not clearly demonstrate that systems and processes are in place to manage consultation projects and how resources are assigned to projects.	clearly demonstrates that systems and processes are in place to manage consultation projects.
Timelines and control management	5	No description of how timelines are managed	Information provided is incomplete, as it does not clearly demonstrate how the project timelines are managed and controlled.	Information provided is complete and clearly demonstrates how the project timelines are managed and controlled.
Quality assurance approach	5	No information on quality assurance provided	Demonstrates basic QA processes for consultation projects; Information is incomplete, the quality assurance approach is not fully described.	Clearly demonstrates QA processes for consultations project. Information is clear and complete; the quality assurance approach is fully described.

R.A3.4 Information security management - 30 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
General security	5	No information provided	Partially described; the Offeror's general security measures are not clearly explained and some elements are missing	Fully described; Offeror's general security measures are clearly explained; personnel, site, assets, etc
Data protection	5	No information provided	Partially described; Offeror's data protection strategy is not clearly explained and some elements are missing	Fully described; Offeror's data protection strategy is clearly explained; data segregation methods, data cleansing practices, etc.
Internal security	5	No information provided	Partially described; Offeror's internal security measures are not clearly explained and some elements are missing	Fully described; Offeror's internal security measures are clearly explained and include all elements; handling of sensitive information, Network and communications security

Stream B – Services for Online Stakeholder and Citizen Engagement and Consultation Activities (180 points)**R.B1. Previous Experience and Project Summaries**

What we are looking for:

Demonstration that the Offeror has undertaken the development, planning and implementation of online stakeholder and citizen engagement and consultation services using appropriate methods and technologies as well as conducting the appropriate analysis and reporting.

R.B1.1. Expert and Strategic Advice - 65 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Engagement Strategy: recommendations on methodologies, techniques and rationale for the approach.	6	No information provided on how the Strategy was developed	Some information is provided on how the Strategy was developed. Does not clearly explain the methodology, web tools and rationale for the approach to meet the project's objectives.	Complete information is provided on how the Strategy was developed. Clearly explains how the methodology, web tools and rationale for the approach met the project's objectives.
Project background and scope:	5	No information on the background of the project and scope was provided.	Some information is provided on the background of the project and scope. Does not clearly demonstrate that the Strategy is aligned with the project background and scope.	Complete information is provided on the background of the project and scope. Clearly demonstrates that the Strategy is aligned with the project background and scope.
Analysis of Stakeholder Environment:	8	No information on the analysis of the stakeholder environment was provided.	Some information is provided on the analysis of stakeholder. Does not clearly explain the advice, recommendations or considerations of the stakeholder environment to meet the project's objectives	Complete information is provided on the analysis of the stakeholder environment. Clearly explains the advice, recommendations or considerations of the stakeholder environment to meet the project's objectives.
Challenges and Solutions:	10	No information provided on challenges and solutions.	Some information provided on challenges and solutions. Does not clearly explain advice, recommendations or considerations such as how to reach underrepresented groups and/or hard to reach populations, influence of regional context, and/or adherence to policies, standards, procedures. Information is incomplete or unclear.	Complete information provided on challenges and solutions. Clearly explains the advice, recommendations or considerations such as how to reach underrepresented groups and/or hard to reach populations, influence of regional context and/or adherence to policies, standards, procedures, Information is complete and clear.
Accommodation and Participation strategy	3.5	No information provided	Explanation included some information about the accommodation and participation strategy, including the user interaction/experience.	Explanation included the complete information regarding the accommodation and participation strategy, including a thorough description of the user interaction/experience.

R.B1.2. Project Management - 30 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Work Plan and Detailed Schedules	2	No information on Work Plans and detailed schedules was provided.	Some information on Work Plans and Schedules provided but did not demonstrate thorough timelines and lacked information	Complete information provided on Work Plans and Schedules provided and illustrates a thorough critical path for activities and deliverables.
Reporting on Progress	2	No information provided on progress reporting.	Some information provided on progress reporting but lacks depth.	Complete information provided on progress reporting. Demonstrates thoroughness.
Overall project management	2	Not described	Not fully described. Some elements of project management missing or incomplete, such as managing HR and how monitoring web analytics impacted project.	Complete information provided and clearly demonstrates how HR was managed and how corrective actions were taking from monitoring web analytics.
Project was delivered within constraints, on-time and within budget	4	No indication that the project was delivered within constraints, on-time and within budget.	Does not clearly demonstrate that the project was delivered within constraints, on-time and within budget.	Information provided demonstrates that the project was delivered within constraints, on-time and within budget.
Challenges and Solutions	5	No information provided on challenges and solutions encountered while managing the project.	N/A	Information provided describing all aspects of change management and control procedures.

R.B1.3 Project Development and Execution - 45 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Types of materials/tools developed	5.5	No information provided on types of materials/tools developed.	Some information provided. Demonstrates a narrow scope of the types of materials/tools developed to support the consultation.	Complete information. Demonstrates a broad production of the types of materials/tools developed to support the consultations
Development of the online presence.	3	No information provided	Information provided partially explains the development of the online presence.	Information provided fully explains the development of the online presence including design, development
Testing Online Presence	3	No information provided	Information provided partially explains the processes and elements for testing the online presence.	Information provided clearly explains the processes and elements for testing the online presence.
Trouble shooting and technical support	3	No information provided	Information provided partially explains processes and capabilities to support troubleshooting and technical support.	Information provided clearly explains the processes and capabilities to support troubleshooting and technical support.
Information security	5	No information provided	The information does not clearly explain the Offeror's approach to information security. Information is incomplete.	The information fully explains the Offeror's approach to information security.
Pilot test		No information provided or not pilot test	The information provided partially describes how the pilot test was conducted.	The information provided fully describes how the pilot test was conducted. It is

	5		Unclear how the pilot tests contributed to the project's positive outcomes.	clear how the pilot test contributed to the project's positive outcomes.
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R.B1.4 Execution of Online Stakeholder and Citizen Engagement Activity - 30 points

	Weight-ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Facilitator's role	5	No information provided	Information provided does not clearly demonstrate the extent of the role of the facilitator.	Information provided clearly demonstrates the extent and role of the facilitator.
Rules of engagement	4	No information provided	Information provided does not clearly demonstrate how the rules of engagement are applied.	Information provided clearly demonstrates how the rules of engagement are applied.
Approach to translation services for online consultations	6	No information provided or no translation services provided	Approach includes reliance on automated software for translation services.	Approach includes reliance on bilingual capacity for translation services.

R.B1.5 Data Analysis and Report Development Services - 35 points

	Weight-ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Planning and outlining data collection methods	4	Not described or no experience	The information does not fully demonstrate experience in planning and outlining data collection methods. Lacks details.	The information provided fully demonstrates experience in planning and outlining data collection.
Performing quantitative and qualitative analysis	5.5	Not described or no experience	The information provided demonstrates basic experience in performing quantitative and qualitative analysis and lacks detail on the type of analysis performed.	The information provided demonstrates extensive experience in performing quantitative and qualitative analysis and provides thorough details on the type of analysis performed.
Challenges and Solutions regarding the production of reports and type of reports	8	Not described or no experience	Information provided describes some challenges and solutions as well as illustrates the firm's capability of producing a limited range of types of reports.	Information provided describes various challenges and solutions as well as illustrates the firm's capability of producing a variety of reports. T

R.B2. Capabilities of Resources in Service Categories**R.B2.1 Expert and Strategic Advice Services - 60 Points**

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in providing strategic and expert advice on consultation or research project using electronic methods/tools.	6	CV not provided; or no experience	CV provided; 5 to 6 years' experience	CV provided; 7 to 8 years' experience	CV provided; as over 9 years' experience
Formal education,	3	CV not provided; or no formal education nor accreditation	CV provided; Post-secondary diploma/degree from	N/A	CV provided; University degree from a recognized

		and professional development.	in social sciences or public administration or related field from a recognized academic institution		academic institution in social sciences or public administration or related field
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	3	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	8	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution	CV provided; demonstrates extensive expertise through their role and contribution

R.B2.2 Project Management Services - 15 Points

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in managing IT, consultation or research projects.	1.5	CV not provided; <u>or</u> no experience	CV provided; <u>5 to 6 years' experience</u>	CV provided; <u>7 to 9 years' experience</u>	CV provided; <u>as over 10 years' experience</u>
Relevant combined formal education, accreditation and professional development	.75	CV not provided; or no formal education nor accreditation and professional development.	CV provided; Post-secondary diploma/degree from a recognized academic institution.	N/A	CV provided; University degree from a recognized academic institution and PMP Designation.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	.75	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	2	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V	CV provided; demonstrates extensive expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V

R.B2.3 Facilitation Services - 30 Points

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in planning, designing	3	CV not provided; <u>or</u> no experience	CV provided; <u>3 to 5 years' experience</u>	CV provided; <u>6 to 9 years' experience</u>	CV provided; <u>as over 10 years' experience</u>

and facilitating electronic/online sessions with diverse stakeholders.					
Relevant combined formal education, accreditation and professional development	1.5	CV not provided; or no formal education nor accreditation and professional development.	CV provided; Post-secondary diploma/degree but no certification and professional development	CV provided; Post-secondary diploma/degree AND training in facilitation.	CV provided; Post-secondary diploma/degree AND training in facilitation AND certification in facilitation.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	1.5	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	4	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution	CV provided; demonstrates extensive expertise through their role and contribution

R.B2.4 Computer and Information Systems Services - 45 Points

	Weighting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in web development, web-based application development AND demonstrated experience and knowledge of W3C Web Standards.	4	CV not provided; <u>or</u> no experience	CV provided; <u>2 to 3 years' experience</u>	CV provided; <u>4 to 5 years' experience</u>	CV provided; <u>as over 6 years' experience</u>
Relevant combined formal education, accreditation and professional development	2	CV not provided; <u>or</u> no formal education or accreditation and professional development.	CV provided; post-secondary degree in computer science, programming or a related IT field from a recognized academic institution	N/A	CV provided; University degree from a recognized academic institution in computer science, programming or a related IT field.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	2	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development related to engagement
Explain role and contribution that demonstrate the individual's expertise	7	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution to the	CV provided; demonstrates extensive expertise through their role and contribution to

in the two (2) sample projects in their C.V.				successful outcome of the two (2) sample project in their C.V	the successful outcome of the two (2) sample project in their C.V
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R.B2.5 Content Development Services - 15 Points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience in writing documents for the web to inform and solicit feedback from a variety of stakeholder groups	1.5	CV not provided; <u>or</u> no experience	CV provided; <u>3 to 5 years' experience</u>	CV provided; <u>6 to 7 years' experience</u>	CV provided; <u>as over 8 years' experience</u>
Formal education,	.75	CV not provided; <u>or</u> no formal education or accreditation and professional development.	CV provided; post-secondary courses in communications, literature or related field from a recognized academic institution	N/A	CV provided; University degree in communications, literature or related field from a recognized academic institution
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	.75	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	2	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V	CV provided; demonstrates extensive expertise through their role and contribution to the successful outcome of the two (2) sample project in their C.V

R.B2.6 Data Analysis and Reporting Services - 30 Points

	Weigh- ting	0 point- (criterion is not met)	1 point- (criterion is partially met)	2 points - (criterion is met)	3 points (criterion is fully met)
Number of years of experience performing quantitative and qualitative data analysis and report development	3	CV not provided; or no experience	CV provided; 3 to 4 years' experience	CV provided; 5 to 6 years' experience	CV provided; over 7 years' experience
Formal education	1.5	CV not provided; or no formal education	CV provided;. Post-secondary diploma/degree from a recognized academic institution.	CV provided; University degree in social sciences or related field from a recognized academic institution	CV provided; University degree in social sciences or related field AND demonstrated courses in research from a recognized

					academic institution.
Efforts made to maintain/upgrade their professional skills and knowledge related to engagement. (accreditation and professional development)	1.5	CV not provided <u>or</u> no professional development.	N/A	CV provided; references some professional development related to engagement.	CV provided; demonstrates extensive professional development. related to engagement
Explain role and contribution that demonstrate the individual's expertise in the two (2) sample projects in their C.V.	4	CV not provided <u>or</u> no relevant expertise demonstrated.	N/A	CV provided; demonstrates some expertise through their role and contribution	CV provided; demonstrates extensive expertise through their role and contribution

R.B3. Understanding and Approach

R.B3.1 Understanding of Government of Canada requirement - 20 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Processes and approach to ensure compliance with GC acts, codes, regulations and policies	10	Not provided	Information provided not clearly demonstrated the Offeror processes and approach to ensure that services are deliver in accordance with the GC acts, codes, regulations and policies.	All information provided is complete. Information provided clearly demonstrated the Offeror processes and approach to ensure that services are deliver in accordance with the GC acts, codes, regulations and policies.

R.B3.2 Opportunities and challenges - 20 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Opportunities and challenges in providing online stakeholder and citizen engagement and consultation services	10	Not provided	Opportunities and challenges are identified but not fully described; Not clearly adhering to GC requirement	Opportunities and challenges are identified and fully described. Clearly adhering to GC requirement

R.B3.3 Quality Assurance - 30 points

	Weight -ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
Resource management	5	No description of how the resources are assigned to projects and managed	Information provides a basic understanding and does not clearly demonstrate that systems and processes are in place to manage consultation projects and how resources are assigned to projects.	Information provides an in-depth understanding and clearly demonstrates that systems and processes are in place to manage consultation projects.
Timelines and control management	5	No description of how timelines are managed	Information provided is incomplete, as it does not clearly demonstrate how the project timelines are managed and controlled.	Information provided is complete and clearly demonstrates how the project timelines are managed and controlled.
Quality assurance approach	5	No information on quality assurance provided	Demonstrates basic QA processes for consultation projects; Information is	Clearly demonstrates QA processes for consultations project. Information is clear

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			incomplete, the quality assurance approach is not fully described.	and complete; the quality assurance approach is fully described.
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R.B3.4 Information security management - 30 points

	Weight-ing*	0 points criterion is not met)	1 point - (criterion is partially met)	2 points (criterion is fully met)
General security	5	No information provided	Partially described; the Offeror's general security measures are not clearly explained and some elements are missing	Fully described; Offeror's general security measures are clearly explained; personnel, site, assets, etc
Data protection	5	No information provided	Partially described; Offeror's data protection strategy is not clearly explained and some elements are missing	Fully described; Offeror's data protection strategy is clearly explained; data segregation methods, data cleansing practices, etc.
Internal security	5	No information provided	Partially described; Offeror's internal security measures are not clearly explained and some elements are missing	Fully described; Offeror's internal security measures are clearly explained and include all elements; handling of sensitive information, Network and communications security

Annex "E" Relevant Terms

Classified information: Requires protection for matters in the national interest and is categorized as Confidential, Secret, or Top Secret.

Consultation and citizen engagement: activities, as described in the Communications Policy, involving a planned two-way discussion between participants (individuals or representatives of organizations) and minister(s), public servant(s) or their representatives (contractors) for the purpose of exchanging views and concerns or debating ideas and proposals to inform decisions. Consultation and citizen engagement may also be carried out by requesting the submission of ideas or proposals on a particular topic by way of a letter, an email, a document, a Web site submission box or a social media platform (there is no questionnaire for the public to answer).

The objective of consultation and citizen engagement is to directly engage the public through active dialogue whether in person or on-line. This activity enables the government to take into account the public's views, concerns, ideas and proposals in the development or assessment of government policies, programs, services and initiatives.

Ministers, public servants or their representatives actively participate in the exchange or debate, share their views, concerns, ideas and proposals, and provide additional information.

Consultation and citizen engagement activities may involve participants from a variety of groups, including the general public, clients, experts, public servants, stakeholders and representatives of organizations. Information is generally provided beforehand to stimulate discussion and facilitate informed views.

Consultation and Citizen Engagement activities can take place in-person or online (using Web 2.0 Tools).

In-Person Consultations: includes, but is not limited to feedback on discussion documents, roundtables, workshops, town hall meetings, dialogue sessions, advisory boards and partnerships meant to influence decision-making.

Online (also called electronic, e-Consultation, e- Participation, Web Consultation): Online consultations involves the delivery of consultation services using internet-based Web 2.0 tools and technologies that allow for participatory multi-way information sharing, dialogue and user-generated content meant to influence decision-making. Specific techniques for obtaining online input on a topic may use methods such as: online consultation workbooks, online discussion groups or dialogues, factual/behavioural-based questionnaires, and chat rooms, wikis, blogs, issues forums, crowdsourcing, etc.

Consultation Workbook: A workbook is a publication, produced in print, electronic form, or both, that provides contextual information and elicits views or invites users to suggest solutions to a set of problems or challenges. A workbook may be used for obtaining feedback on a specific policy direction. Depending on the issues to be addressed and the scope and depth of input required, a workbook can be distributed as a stand-alone stakeholder engagement tool, or as one part of a larger consultative or deliberative exercise.

Designated Organization Screening (DOS): An organization security screening/clearance is an administrative determination that an organization is eligible, from a security point of view, for access to information and assets of the same or lower protection/classification level as the screening/clearance being granted. This administrative determination is based on the Government Security Policy and its associated standards. A DOS registered organization permits the organization and its employees

possessing Reliability Status access to Protected information, assets and/or certain restricted work sites. A DOS clearance is available at levels: Protected A, B or C. For more information on DOS, go to: <http://www.ciisd.gc.ca/text/os/nfg-e.asp>

Document Safeguarding Capability (DSC): DSC is the approval granted by the Canadian and International Industrial Security Directorate (CIISD), at a specific sensitivity level, to a private sector organization in order to safeguard Canadian and foreign government sensitive information and assets on its premises. A Public Works and Government Services Canada (PWGSC) Field Industrial Security Officer (FISO) will inspect the organization's site(s) to assess if it meets the physical and administrative requirements necessary for the performance of the required sensitive work. When a determination has been made that the organization can adequately safeguard sensitive information or assets, CIISD will grant the firm DSC at the required level. A DSC clearance is available at protected levels of: Protected A, B or C AND at classified levels of: Confidential, Secret and Top Secret. For more information on DSC, go to:

<http://www.ciisd.gc.ca/text/os/sco-e.asp>

Facility Security Clearance (FSC): FSC is required before an organization can be awarded CLASSIFIED contracts. Key Senior Officials must be cleared in connection with a Facility Security Clearance. Officials include the Company Security Officer and owners, officers, directors (of the board), executives and partners who occupy positions which may enable them to adversely affect an organization's policies or practices in the performance of CLASSIFIED contracts. As a minimum, organizations shall have their Key Senior Officials cleared to the classification level required before a Facility Security Clearance will be granted. An FSC clearance is available at levels: Confidential, Secret or Top Secret. For more information on FSC, go to:

<http://www.ciisd.gc.ca/text/ISM/ch3part2-e.asp>

Non-Sensitive Information: This type of information is not classified or protected, but must be handled in accordance with the records management, information technology, financial and personnel policies of the departments. Such information bears no special markings. Examples:

- annual reports, program information, etc.

PROTECTED Information: Information that is not in the national interest but is sensitive because it deals with individuals, private companies, organizations or departmental operations and could cause harm if not properly safeguarded. This is the type of information most commonly found in offices. Such information is PROTECTED A or PROTECTED B depending on the degree of sensitivity. PROTECTED C, deals with extremely sensitive information, such as life-threatening situations and is rarely encountered and will not be described.

Protected A: Information of low sensitivity with limited risk of injury to individuals or institutions.

Examples:

- basic personal information, such as a person's name, address, sex, date of birth or SIN;
- security screening information, such as Consent to Disclosure of Personal Information;
- educational and employment histories; and
- basic information on individuals participating in a departmental program.

Protected B: Information that is particularly sensitive with high risk of injury to individuals, specific public or private interests. This is the bulk of departmental information. Examples:

- client files that include detailed personal information;
- medical, psychiatric, psychological evaluations;

Public: Public is defined broadly to cover all the individuals or groups who may be interested in or affected by the policies, programs, services and regulations under the purview of a specific Gc department. The definition does not require the certainty that any individual or group has such an interest; just that they may have. The public includes citizens, consumers, patients, professionals, academia, industry, public servants and the groups that represent them.

Public opinion research: an environment analysis activity, as described in the Communications Policy, involving the planned collection, by or for a department, of opinions, attitudes, perceptions, judgments, feelings, ideas, reactions or views of any target audience with the help of research instruments, such as questionnaires (with or without interviewers) or discussion guides for moderators.

The objective of public opinion research is data collection, which is one way (e.g. a question, whether closed or open ended, is asked and an answer is provided by the respondent or participant). The research may involve respondents or participants from any target audience, including the general public, clients, experts, public servants, stakeholders and representatives of organizations.

In order not to influence or taint the data collected (i.e. the views and opinions of the respondent or participant), public servants or contracted service providers do not share their views and perspectives with the participants or respondents. Discussions or debates can occur among participants when using qualitative research techniques such as focus groups; but, unlike consultation and citizen engagement, the moderators' or interviewers' role is limited to asking questions without sharing their views and perspectives. Information may be provided beforehand to facilitate informed views.

Public opinion research includes opinion-based information collected through quantitative methods, qualitative methods or both, irrespective of size or cost. It involves activities such as the design and testing of gathering methods and research tools, sampling, data collection, data entry, data coding, primary data analysis and on-line panel development and management.

Public opinion research techniques may include in person, telephone, on-line and mail surveys, intercept interviews, in person and virtual focus groups, bulletin boards, in-depth interviews, dyads, triads or mini-groups.

The following are not considered public opinion research (POR):

- 1) Consultation and citizen engagement activities;
- 2) behavioural or factual research (collection of exclusively behavioural or fact-based information);
- 3) literature reviews or reviews of secondary sources, including reviews of already conducted and analyzed public opinion research;
- 4) secondary data analysis;
- 5) verification of supplier/contractor delivery of goods and services in contract situations;
- 6) employee exit interviews;
- 7) 360 degree employee/manager reviews;
- 8) Web site feedback boxes; and
- 9) non-contracted assessment of training or information sessions either in person or on-line.

Stakeholders: The term "stakeholders" refers specifically to individuals, groups or organizations *external* to government who have an interest in, have some influence on, or are affected by a given policy or program of a specific Gc department. Stakeholders can be citizens, interest groups, associations, sector representatives, private companies, academics, Aboriginal groups and many others. ***In some instances,** "stakeholders" may also be internal to government.

Stakeholder Relations: Refers to the existence and quality of the relationship between a specific department and its many stakeholders. Building good stakeholder relationships, like building trust, is an ongoing process. Relationship with stakeholders are established, maintained, nurtured a follow-up phone-call. Whether it happens in these day-to-day business interactions or through more formal

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stakeholder engagement activities such as consultations or workshops, a reputation for excellence in stakeholder relations is something that is earned over time.

Unclassified information: Information that is freely available from other sources and does not constitute any particular security risk to Government, organizations or individuals. Most of the information held and used by Government does not require classification.

Web 2.0 Tools: Refers to Internet-based tools and services that allow for participatory multi-way information sharing, dialogue, and user-generated content. This can include social media, which allow participants with distinct social/user profiles to create, share and interact with user-generated content, including text, images, video and audio (e.g. Facebook, Twitter, YouTube, Linked-In, blogs) as well as collaborative technologies that allow multiple users to collaboratively create content (e.g. Wikis, Google Docs).