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K1A 0S5

Bid Fax: (819) 997-9776

Revision to a Request for Supply

**Arrangement - Révision à une demande
pour un arrangement en matière
d'approvisionnement**

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

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

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| Title - Sujet EVENT MANAGEMENT SERVICES | |
| Solicitation No. - N° de l'invitation EN578-133309/C | Date 2013-10-16 |
| Client Reference No. - N° de référence du client EN578-13-3309 | Amendment No. - N° modif. 004 |
| File No. - N° de dossier cx027.EN578-133309 | CCC No./N° CCC - FMS No./N° VME |
| GETS Reference No. - N° de référence de SEAG PW-\$\$CX-027-63547 | |
| Date of Original Request for Supply Arrangement 2013-09-23 Date de demande pour un arrangement en matière d'app. originale | |
| Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-10-22 | |
| Address Enquiries to: - Adresser toutes questions à: Buck(CX Div.), Daniel | Buyer Id - Id de l'acheteur cx027 |
| Telephone No. - N° de téléphone (613) 998-8588 () | FAX No. - N° de FAX (613) 993-2581 |
| Delivery Required - Livraison exigée | |
| Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: | |
| Security - Sécurité This revision does not change the security requirements of the solicitation. Cette révision ne change pas les besoins en matière de sécurité de l'invitation. | |

Instructions: See Herein

Instructions: Voir aux présentes

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|--|--------------------------|--------------------------|
| Acknowledgement copy required | Yes - Oui | No - Non |
| Accusé de réception requis | <input type="checkbox"/> | <input type="checkbox"/> |
| The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre. | | |
| Signature | Date | |
| Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie) | | |
| For the Minister - Pour le Ministre | | |

AMENDMENT 004

The purpose of this amendment is to:

Part A) Respond to bidder's questions:

Question 8: Part 3 Arrangement Preparation Instructions, Section 1; Can the soft copy be submitted on CD or DVD?

Answer 8: No, Suppliers must submit the requested soft copy on USB.

Question 9: Part 4 Evaluation Procedures and Basis of Selection, M.2 Event Management Services; In the situation where a supplier has provide services to an annual event for two or more years, would each annual event be considered a separate project?

If no, then would a supplier be able to combine the attributes for the whole event spanning multiple years (e.g. The firms revenue, number of days on-site, etc.)

Answer 9: For the purposes of evaluation, if a supplier provides services for the same annual event over multiple years, each year will be considered a separate event. Please note that suppliers must provide a letter of reference for each event management project sample submitted.

Question 10: Part 4 Evaluation Procedures and Basis of Selection, M.4 Environmental Considerations; Given that this is a mandatory requirement, it is critical for suppliers to understand how this requirement will be evaluated. Please confirm that the evaluation will only consider whether or not the supplier has the required statement, mission, action plans and attributes, and that it will not assess the quality or content of these items. If the content will be assessed, please provide a clear indication as to the standards that must be met by suppliers considering the submission of a proposal.

Answer 10: For the purposes of evaluation, suppliers must provide the environmental statement and mission as well the action plans specified in M.4 Environmental Standards. The content of the environmental standard and mission, action plans and attributes will not be assessed against any standard.

Question 11: Part 4 Evaluation Procedures and Basis of Selection, M.4 Environmental Standards, 2nd bullet; In the case where a supplier does not own their premises, may bidders simply indicate "Not Applicable" for this item?

Answer 11: No, if suppliers do not own the premises where they conduct business, suppliers must provide their action plan for energizing sourcing describing the measures taken to improve energy efficiency as specified in M.4 Environmental Standards.

Question 12: Part 4 Evaluation Procedures and Basis of Selection, Section 3 Security; It is indicated that "Suppliers are reminded to obtain the required security clearance promptly. In order to do so will PWGSC sponsor suppliers prior to bid closing? How could vendors initiate this request?

Answer 12: PWGSC will not sponsor suppliers until after bid closing. Suppliers must clearly indicated in their proposal if they need to be sponsored for security.

Question 13: Part 4 Evaluation Procedures and Basis of Selection, M.1 Experience of the Firm; Other than indicating in the proposal the number of years that the firm has been specialized in the provision of

event management services is there any additional supporting information required (for example, a listing of events extending past 3 years)?

Answer 13: Suppliers must provide all of the information specified in M.1 Experience of the Firm.

Question 14: Do we understand correctly that beyond evaluating whether M1 to M4 Met/Not Met submission requirements, there is no further point rated or other criteria judged (Certifications aside) for this RFSA qualification?

Answer 14: There are no point rated criteria that form part of the evaluation of the Request for Supply Arrangement. An Arrangement must comply with the requirement of the Request for Supply Arrangement and meet all mandatory technical evaluation criteria to be declared responsive.

Question 15: Part 1 General Information, Section 2 Summary; "A Notice will be posted once a year on buyandsell.gc.ca to allow new suppliers to become qualified." Is the first time this happens is in 2014 or 2015?

Answer 15: The notice will be posted on buyandsell.gc.ca in 2014.

Question 16: Call-ups Pricing - Annex B and Appendix 2 - Do we understand correctly that Quoted Rates for time in Call ups can vary for each and every Call-up? There are no standard rates applicable year to year or project to project? Same for Mark-up?

Answer 16: Annex E *Detailed Process for Request for Proposals issued under the Supply Arrangement*, includes information related to the procurement process conducted under any resulting Supply Arrangement. The Annex B Basis of Payment and the Appendix 2 Pricing Evaluation and Workbook included in Annex E relates specifically to individual Requests for Proposal that would be conducted under resulting Supply Arrangements.

There are no standard rates that form a part of the Supply Arrangement itself. The rates and mark-up submitted by SA Holders may vary as required for individual projects.

Question 17: Annex "E" Sample Criteria for RFPs issued under the Supply Arrangements;

This RFSA has resolved long-standing concerns about barriers to small business, particularly those concerns in the previous RFSA around the requirement to provide employees only as part of qualifying for the RFSA. However, the sample criteria for subsequent RFPs issued under the Supply Arrangement undo the resolutions to those concerns, particularly the sample requirement as described in M.2.

While we recognize that these are sample criteria and may be changed by the client, the mere suggestion that only employees, as defined in M.2, can be provided under RFPs issued under the Supply Arrangement is highly discouraging to small businesses capable of handling many of the events which could be procured through this supply arrangement. Even for large firms, freelancers, contract, sub-contracted, or part-time resources are often used based on the requirements on the project and availability of staff.

To address these concerns, and to prevent any unnecessary issues in the future, we request that the sample criteria be changed to remove the use of the terms "employee" and "employees" and replace this with "resource" and "resources". The definition for employee should also be removed.

Answer 17: The definition for employee will not be changed and the term employee will not be removed from Annex "E" Sample Criteria for RFPs issued under the Supply Arrangements. To provide client

departments/agencies with more flexibility, a revision has been made to Annex "E" Sample Criteria for RFPs issued under the Supply Arrangements as per Part B of this amendment.

Part B) Revise the following:

1) Delete Annex "E" Mandatory Requirements in its entirety and replace with:

Mandatory Requirements

Combinations of the following mandatory evaluation criteria only can be used RFPs issued under the Supply Arrangements. Any Combination of the resources may be used for the Evaluation of M.2 Proposed Resources. If a Mandatory Requirement is omitted, the remaining requirements should be renumbered, as applicable.

1.1.1 Mandatory Technical Criteria

M.1 Financial Proposal

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

M.2 Proposed Resources

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

The same resource may be proposed for more than one category of personnel, however the resource must meet all of the criteria for each category (as per the definitions below) and the rates proposed in Appendix "1" for all categories for that resource must be identical.

For example, if three (3) different individuals are proposed for the Senior Event Manager position, and three (3) individuals (one (1) of which was also proposed for the Senior Event Manager position) have also been proposed for the Event Manager position, the resource proposed for both positions must meet the criteria below for both the Senior Event Manager and the Event Manager, and the rates proposed in Appendix "2" for both the Senior Event Manager and the Event Manager positions must be the same.

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

- at least three (3) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates);
- has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
- has managed events with delegates from either: more than one (1) province or territory; or more than one (1) country; or both;
- has managed events that require one (1) or more of the firm's personnel to be on-site for three (3) days or more;
- has managed events with a minimum of one hundred (100) delegates; and

-
- has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications.

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

- at least two (2) years experience in leading the development and execution of events, particularly high profile events (an event which is highly publicized, politically sensitive, or involving well-known or high-ranking delegates);
- has managed events where the firm's assigned portion of the overall budget was at least \$200,000 (including professional fees, direct expenses, sub-contracting expenses, travel and living expenses, and any other project-related revenues, as applicable);
- has managed events with delegates from either: more than one (1) province or territory; or more than one (1) country; or both;
- has managed events that require one (1) or more of the firm's personnel to be on-site for three (3) days or more;
- has managed events with a minimum of one hundred (100) delegates; and
- has provided or overseen the provision of all of the following: accommodations, hospitality, transportation, registration and printing or publications.

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

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

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

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

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

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

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

This Mandatory Requirement will be rated in R.1.

M.3 Events Management Projects

The Bidder must provide five (5) events management projects, where the event dates were after January 1, 2008. Each of the Senior Event Managers, Event Managers, Event Coordinators, Financial Managers and Event Assistants identified in M.2 must have been involved in the planning of at least one (1) event. An event may be used to demonstrate the experience of more than one (1) resource, however no more than five (5) projects are to be submitted. At a minimum, three (3) of the five (5) projects must demonstrate an ability of the Bidder to provide event planning services where the profile of participants is varied. "Participant" is defined as including, but not restricted to, a potential audience, actual delegate, speaker/presenter, moderator, session chair, or member of a client group. "Varied" is defined as including three or more of the following profiles - general public, senior citizens, youth, senior executives, parliamentary officials, VIPs, Veterans, etc. - within one (1) event.

The Bidder must provide the following information:

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

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

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