

REQUEST FOR STANDING OFFER No. 216

Editorial Services

This is a Request for Standing Offer (RFSO) for the provision of editorial services for the Office of the Auditor General of Canada (OAG).

The OAG will consider entering into a Standing Offer Agreement (“SOA” or “Contract”) with proponents that provide the best valued services, as described within this RFSO. The OAG will consider entering into SOAs with qualified firms or independent contractors. The OAG intends to establish separate SOAs for English Editors (Stream 1) as well as SOA’s for French Editors (Stream 2).

Stream 1: English Editors: The OAG intends to establish multiple SOAs with qualified English Editors. The SOAs will be for a **three (3) year period with options to renew for two (2) additional one-year periods.**

Stream 2: French Editors: The OAG intends to establish multiple SOAs with qualified French Editors. The SOAs will be for a **three (3) year period with options to renew for two (2) additional one-year periods.**

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SECTION 1 RFSO GENERAL INSTRUCTIONS AND CONDITIONS

- 1.1 The proposal **must** be received at the following address no later than **2:00 p.m., Ottawa time on 16 December 2013**. Proposal packages must be received at the Mail Scanning Room in the CD Howe Building and proponents should make appropriate time allowances for this process.

Office of the Auditor General of Canada
Contract & Procurement Services
240 Sparks Street – CD Howe Building
Main Scanning Room S-143; S-1 Level
Ottawa, Ontario
K1A 0G6

Contracting Authority:

Lars Norgaard
Contracting and Procurement Services
Telephone: (613) 952-0213 ext. 5006
Fax: (613) 957-9735

Email: lars.norgaard@oag-bvg.gc.ca and GX-Contracting@oag-bvg.gc.ca

- 1.2 Five (5) copies of the Technical Proposal and two (2) copies of the Financial Proposal should be submitted. The medium for all original proposal data should be 8 ½" x 11" bond paper, printed double-sided. Fonts used should not be smaller than Times New Roman 11 point with margins of a minimum size of 1 inch top, bottom, left and right.

One (1) additional copy of the Technical Proposal and one (1) additional copy of the Financial Proposal should be submitted in electronic format. Copy should be in MS Word (2007 version preferred) or in text format on CD ROM or data stick.

Financial Proposals should be submitted in a **separate**, easily identified envelope. Both the Financial and Technical Proposals should be submitted together as one package. The outside of the package should clearly identify the name and address of the submitting firm. The package should be clearly labelled as follows, **either**:

- **“RFSO No. 216 Editorial Services” Stream 1: English - OR -**
- **“RFSO No. 216 Editorial Services” Stream 2: French**

Proponents have the sole responsibility for the timely receipt of the proposal by the OAG. Late proposals will be returned unopened. Proponents must prepare a proposal addressing all the requirements as stated within this RFSO.

- 1.3 Proposals **should** be organized as prescribed, using the required numbering scheme, and should follow to a maximum page limit, as described in section 3.1.
- 1.4 Electronic transmission of your proposal by such means as electronic mail or facsimile will **not** be accepted.
- 1.5 The OAG may cancel the RFSO at any time without further obligation to the proponents. As well, the OAG may decide not to issue any Contract as a result of this RFSO without any further obligation to the proponents.
- 1.6 The OAG may ask a Proponent to substantiate any claims made in a proposal.
- 1.7 If a Proponent feels that the requirements stipulated are unnecessarily restrictive in any way and wishes to deviate from the requirements, the Proponent may provide a detailed explanation as to why such a deviation is being proposed. The OAG is not obligated to accept any proposed deviations.
- 1.8 The cost of preparing the proposal will not be reimbursed by the OAG.
- 1.9 Any amendment by the OAG to this RFSO shall be in writing and will be posted on **BuyandSell.gc.ca**.
- 1.10 The proposal will be evaluated according to the terms set out in section 4. The Proponent **must** comply with **all** of the mandatory and rated requirements. Failure to comply with **any** mandatory requirement will render the proposal non-compliant and it will receive no further consideration.
- 1.11 All proposals **should** indicate clearly if any of the proposed resources are to be subcontracted. In such cases, the proposal **should** provide information on the proposed sub-contractor and confirm that the Proponent has exclusive rights to the services of the sub-contractor for the purposes of this proposal.
- 1.12 Proposals received in response to this request shall become the property of the OAG and will not be returned.
- 1.13 Proponent Questions:
 1. All enquiries concerning this proposal **must** be submitted in writing by electronic mail to the OAG Contracting Authority identified previously (section 1.1.)
 2. Enquiries **must** be received by the OAG Contracting Authority no less than fifteen (15) working days prior to the bid closing date (in accordance to section 1.1 above) to ensure sufficient time to provide a response. The OAG will not reply to any enquiries received after that time.
 3. Proponents should reference as accurately as possible the numbered item or section of the RFSO to which the question applies. Care should be taken by proponents to explain each question in sufficient detail in order to enable the OAG to provide an accurate answer.
 4. To ensure consistency and quality of information provided to proponents, the Contracting Authority will provide, through **BuyandSell.gc.ca**, any information with

respect to significant enquiries received and the replies to such enquiries without revealing the sources of the enquiries.

5. All enquiries and other communications with OAG officials pertinent to the Request for Standing Offer throughout the solicitation period are to be directed **ONLY** to the Contracting Authority named herein (in accordance with section 1.1).
Noncompliance with this condition during the bid solicitation period will for that reason alone, result in disqualification of a Proponent's proposal.
- 1.14 Should sufficient questions be raised, a Proponent's conference may be held on OAG premises. Should a Proponent's conference be held, notification will be provided on **BuyandSell.gc.ca** of the date, time and location of the conference.
- 1.15 This RFSO constitutes the entire understanding of the work required; in the event of any differences between the RFSO and documents submitted by the Proponent, the RFSO will govern.
- 1.16 After the successful Proponent is selected, a standing offer agreement (SOA) will be awarded based on the services described in this statement of work. No work is guaranteed as a result of a SOA being issued.
- 1.17 The Proponent declares that the Proponent has not, directly or indirectly, paid or agreed to pay, and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or obtaining of the contract if the payment of the fee would require the individual to file a return under section 5 of the Lobbying Act; and
- 1.18 The Proponent declares that the Proponent has not been convicted of an offence, other than an offence for which a pardon has been granted, under section 121, 124 or 418 of the Criminal Code.

SECTION 2 STATEMENT OF WORK

2.1 Background

2.1.1 The Office of the Auditor General of Canada (OAG) produces a variety of published reports and internal documents that need editing services.

2.1.2 Typical documents produced by the OAG include the following:

- a. Audit reports,
- b. Audit manuals and guides,
- c. Studies and special reports, and
- d. A variety of other documents, as required

2.2 Description and Scope of Work – Stream 1: English Editors and Stream 2: French Editors

2.2.1 The successful Proponent (Contractor) may be required to edit a variety of OAG internal and external communications products. Most of the work involves editing complex reports and manuals in the field of auditing. Documents range in length. The following definitions are based on editorial skills as defined by the Editors' Association of Canada. English and French editing services may include:

- a. **Substantive editing:** Assessing the content, reorganizing the structure of documents; clarifying meaning, eliminating jargon; assessing or suggesting graphic elements to improve the content; posing questions to authors; following up with responses and revisions to bring the document to the next stage of edit. May include rewriting parts of a document based on content and research provided or approved by the author. May include some research and writing of original material;
- b. **Stylistic editing:** Rewriting and revising sentences to conform to plain language principles; revising to ensure consistent style; applying the OAG styles;
- c. **Copy editing:** Revising grammar, punctuation, spelling, and mechanical elements (e.g. level headings, running heads); ensuring consistency; and checking facts and graphic elements, wherever necessary;
- d. **Proofreading:** Proofreading text before layout; and after layout to correct errors and ensure it follows OAG publication standards and style. This includes comparative

proofreading of translated documents to ensure the accuracy of the translation with the original language;

- e. **Comparative editing/Revising translations:** An in-depth comparison of an original text and its translation and revising the translation to ensure its accuracy with the original text. This type of editing may also include some translation of short sections of text (generally less than 500 words of text per section). This typically includes translating minor changes from the author and editor of the original language text. Extensive changes to a translation are typically sent to a separate translation supplier.
- f. **Developmental/project editing:** Providing editing services and advice and coordinating a publication project. This may include reviewing the quality of the editing, directing the development of a rough draft to its final version, and considering input from the author and various reviewers.

2.2.2 The OAG is seeking editing services related to the two (2) official languages, English and French. The majority of the Office's documents are written in English and translated into French. The Office is seeking unilingual and bilingual English editors (Stream 1) and bilingual French editors (Stream 2).

- 2.2.3 Contractors may be required to
- a. work onsite occasionally;
 - b. meet with authors to review and discuss editing changes;
 - c. attend briefing meetings, and
 - d. attend training or information sessions.

2.2.4 For security reasons, the OAG may issue laptop computers to successful proponents for working on some protected documents. As well, some work may need to be carried out onsite, at the OAG offices in Ottawa 240 Sparks Street, CD Howe Building, Ottawa and in Montreal :1255 Rue Peel, Montréal, QC. Therefore, successful proponents **must** be available to pick up a computer, meet with clients, and pick up hard-copy assignments in the Ottawa and/ or Montreal Office, as needed. The OAG will not reimburse successful proponents for travel expenses to and from OAG Offices.

2.2.5 Except for hard-copy proofreading, editors must deliver electronic edits (i.e. using the MSWord track changes and comments functions) by agreed upon deadlines.

2.3 Timelines and Service Standards

- 2.3.1. Timelines and deliverables will vary, depending on the length of the document to be edited. Completion and delivery of work may vary depending on the following:
- a. How technical the document is;
 - b. The level of editing required (substantive or copy edit);
 - c. The quality of the translation;
 - d. The amount of research time required for fact checking; and/or
 - e. Word processing time.
- 2.3.2. Service standards are based on a 7.5 hour day, and may vary depending on the variables identified in paragraph 2.3.1, however the following are the service standards for the differing types of documents:
- a. Substantive editing—2500–3500 words per day;
 - b. Stylistic editing—3000–5500 words per day;
 - c. Copy editing—6000–7500 words per day;
 - d. Proofreading—12,000–15,000 words a day; and/or
 - e. Comparative editing/revising translations—2000–3750 words a day.
- 2.3.3. A Proponent may propose a maximum number of resources for:
- a. Stream 1: five (5) proposed resources for English editing services;
 - b. Stream 2: five (5) proposed resources for French editing services.
- 2.3.4. The Proponent must demonstrate a level of technical ability to
- a. perform work on an OAG issued laptop;
 - b. receive requests to work by email or phone;
 - c. send confirmations of work received by email;
 - d. provide status updates by email; and
 - e. deliver electronic edits using MSWord track changes functions, except for proofreading of laid-out paper copy.

2.4 Estimated value of service contracts

- 2.4.1 The OAG is seeking to establish a series of standing offers for English and French editing services, as shown in Table 1.

Table 1 Estimated value of service contracts

Editors	Estimated Annual Dollar Value Allocated to Each stream
Stream 1: English Editors	\$125,000
Stream 2: French Editors	\$125,000
Estimated Total	\$250,000

SECTION 3 RFSO REQUIREMENTS

3.1 Proposal Page Limits and Structure

- 3.1.1. The Proponents’ proposals should be organized as outlined in Figure 1, following the content and numbering scheme, and should follow the maximum page limit described here.
- 3.1.2 Proponents wishing to bid on English and French language streams **should** submit separate proposals for each stream.
- 3.1.3 For the Technical Proposal, if there is only one proposed resource the technical proposal should be limited to a maximum of ten (10) pages per stream (English or French). These limits include the sections related to mandatory and rated requirements but exclude the appendices.
- 3.1.4 When more than one resource is being proposed (up to a maximum of five (5) English (Stream 1) or five (5) French (Stream 2) proposed resources for one proposal), the Technical Proposal should be limited to a maximum of twenty (20) pages. This includes the sections related to mandatory and rated requirements but excludes the appendices.
- 3.1.5 These are the number of pages per stream permitted to respond to the requirements. Any proposals longer than the stipulated limits will result in points being deducted in the rated criteria.

FIGURE 1 Suggested Structure of Proposals and Content Numbering

<p><u>Technical Proposal for Editorial Services</u></p> <p><u>1. Introduction</u></p> <p>1.1. Brief description of Proponent/Firm</p> <p>1.2. Response to mandatory requirements (see Table 6 in Appendix D for how to show compliance with mandatory requirements)</p> <p><u>2. Proponent’s Experience (see Table 7 in Appendix D)</u></p> <p>2.1. Stream 1: English Editors: —project summaries for English editors (rated requirements)</p> <p>- or - Stream 2: French Editors: project summaries for French editors (rated requirements)</p> <p><u>3. Technical Proposal Appendices</u></p> <p>A. Proposed Resource(s) / Résumés (see Table 5 in Appendix C)</p> <p>B. Required Certifications (Employment Equity, and Education and Experience, Availability, and Status of Personnel) (see Appendix B)</p> <p><u>Financial Proposal</u> (under separate cover)</p>

3.1.7 The following provides additional guidance on the required content of the different sections of the proposals.

3.2 Introduction of the proposal

3.2.1 The Proponent may provide introductory text about the editors level of experience, specialization, business, clientele, vision, and any other pertinent career experience or knowledge.

3.3 Mandatory requirements

- 3.3.1 Proponents’ proposals **must** meet all of the RFSO mandatory requirements as indicated below M1 to M4, in order for their proposals to be considered for evaluation. Failure on the part of the Proponent to meet any one (1) or more of the mandatory requirements will result in their proposal being deemed non-compliant and given no further consideration. The mandatory requirements are as follows:
- 3.3.2 **M-1** The proposal **must** be received as described in Section 1.1.
- 3.3.3 **M-2.** Appendix B – Required Declarations & Certifications, **must** be completed and **must** be signed by an authorized official.
- 3.3.4 **M-3.** The Technical Proposal **must** include a summary description of two (2) projects completed successfully within the last five (5) years that relate to English and/or French Editorial Services. For proposals in which more than one editor is being proposed (to a maximum of five (5) English (Stream 1) or five (5) French (Stream 2) proposed resources per proposal), two (2) project summaries **must** be provided per editor. Project summaries **must** describe work on documents that are at least thirty (30) pages (approx. 8,000 words) in length. The Proponent **must** use the summary Template presented in Table 2.

Table 2 Summary Template for Proposed Resource(s)

Summary Template for Proposed Resource	
Name and working languages of EN/FR Editor	<i>(Name; identify which language the editor works in)</i>
Type of business or position with Proponent	<i>(Identify as sole proprietor, subcontractor, or employed staff)</i>
Years of Experience	<i>(Provide total number of years of experience as an editor. Refer to Appendix C—minimum requirements and qualifications. Maximum 2 words, e.g. 20 years)</i>
Designations and Education (list the most relevant titles, degrees, diplomas, certificates, certifications)	<i>(Refer to Appendix C—minimum requirements and qualifications. Maximum 50 words)</i>
Project #1—Title & Client:	<i>(Title of document and name of client/organization)</i>

Summary Template for Proposed Resource	
Description of document/project	(Maximum 130 words. Description should include <ul style="list-style-type: none"> • Type of document (e.g. research paper, manual, report); • Length of document (word count); and • Purpose and audience for document.
Role on project	(Type of editing performed, e.g. substantive, copy editing, proofreading, comparative editing. Maximum 40 words.)
Start / End dates of assignment:	(Provide only dates and in the following format: month/day/year, e.g., March 15, 2007 to April 10, 2007)
Effort of Proposed resource (number of hours worked on document)	(Provide total number of hours, or if Proponent performed different types of editing, providing the total hours for each type of editing is acceptable.)
Client reference / Contact	(Contact person, title, current phone number and email address. All references will be contacted.)
Project #2—Title & Client:	
Description of document/project	(Maximum 130 words. Description should include <ul style="list-style-type: none"> • Type of document (e.g. research paper, manual, report); • Length of document (word count); and • Purpose and audience for document.)
Role on project	(Type of editing performed, e.g. substantive, copy editing, proofreading, comparative editing. Maximum 40 words.)
Start / End dates of assignment:	(Provide only dates and in the following format: month/day/year, e.g., March 15, 2007 to April 10, 2007)
Effort of proposed Resource (number of hours worked on document)	(Provide total number of hours, or if Proposed Resource performed different types of editing, providing the total hours for each type of editing is acceptable.)
Client reference / Contact	(Contact person, title, current phone number and email address. All references will be contacted.)
Other Information:	
Other Skills / Capabilities	(Maximum 25 words)
Languages skills:	(If the Proposed Resource has been tested by the Public Service Commission of Canada and has valid SLE(Second Language Evaluation) results SLE – Test of Oral Proficiency, Test of Written Expression and Test of Reading Comprehension. Please indicate reading, writing, and oral levels here. Also provide proficiency in any languages other than English or French. Maximum 25 words)
Security clearance:	(For the Proposed Resources currently in possession of a valid

Summary Template for Proposed Resource

Reliability status security clearance, the following information should be provided at the time of proposal submission to provide evidence of compliance with this requirement:

- i. full name of individual,*
- ii. clearance number,*
- iii. clearance level,*
- iv. origin of clearance (Department), and*
- v. effective date.)*

3.3.5 **M-4.** All proposed resources **must** meet the minimum requirements of the category as described in Appendix C of this RFSO:

a. Resumés for each proposed resource **must** be provided and be presented in the format provided in Figure 2.

Figure 2 Required format and structure of the proposed resource’s resumé

<p>Resumé of [name] [Contact information]</p>
<p>Summary of services provided List types of editing skills in bullet form. See paragraphs 2.2.1</p>
<p>Recent experience List the most relevant experience of the past five (5) years.</p>
<p>Past experience List the most relevant past experience. Proposed Resource with many years of experience should select relevant examples of past work to provide evidence of their years of experience. For example, a Proposed Resource with twenty (20) years’ experience may want to present a few examples of work performed ten (10), fifteen (15), and twenty (20) years ago.</p>
<p>Education and memberships List university degree(s), certificates, diplomas, relevant training, and relevant memberships.</p>
<p>See Appendix C, Table 5 for minimum requirements and qualifications.</p>

b. Each proposed resource **must** have a minimum of five (5) years experience as a professional editor (not work as a volunteer).

- c. Each proposed resource **must** have a university degree.

3.4 Proponent experience and rated requirements

- 3.4.1 Technical proposals meeting all of the mandatory requirements will be evaluated and rated based on the point-rated requirements and criteria described in Appendix D Table 7. It is the responsibility of the Proponent to ensure the completeness and clarity of their proposal, ensuring they provide sufficiently detailed evidence to enable the OAG Evaluation Committee to evaluate the Proponent's proposal on the basis of the criteria contained herein.
- 3.4.2 The content found in the summary template presented in section 3.3 (Table 2) will be evaluated and rated based on the point-rated requirements and criteria described in Appendix D Table 7.

3.5 Résumé

- 3.5.1. Resumés **should** not exceed three (3) pages in length. The medium for resumés should be 8½ inch x 11 inch bond paper, printed single-sided. Fonts used should not be smaller than Times New Roman eleven (11) point with margins of a minimum size of one (1) inch top, bottom, left, and right.

3.5.2. Resumés that are longer than the required limit of three (3) pages will result in the deduction of points in the rated requirements.

3.6 Financial Requirements

3.6.1 The Financial Proposal and professional fees submitted are to be based on the following financial considerations:

- a. As part of the Financial Proposal, service fees must be quoted as a fixed/firm per diem? hour rate, expressed in Canadian dollars for three (3) years and for two (2) optional years;
- b. The fixed/firm daily rates must be based on a normal work day of seven and a half (7.5) hours. These rates shall exclude the applicable Sales tax.

Table 3 Professional Fees—English or French Editors

Proponent's resource	Name:	Name:	Name:	Name:	Name:
Rate Per Hour 1 Apr 2014– 31 Mar 2015	\$	\$	\$	\$	\$
Rate Per Hour 1 Apr 2015– 31 Mar 2016	\$	\$	\$	\$	\$
Rate Per Hour 1 Apr 2016– 31 Mar 2017	\$	\$	\$	\$	\$
Rate Per Hour 1 Apr 2017– 31 Mar 2018 (Optional Year)	\$	\$	\$	\$	\$
Rate Per Hour 1 Apr 2018– 31 Mar 2019 (Optional Year)	\$	\$	\$	\$	\$

NOTE: Proponents proposing multiple resources must state the rates for each resource. Proponents may propose a maximum of 5 editors for Stream # 1: English Editors and a maximum of 5 editors for Stream # 2: French Editors.

SECTION 4 BASIS AND METHOD OF EVALUATION

4.1 Evaluation Committee and Process

- 4.1.1 Two separate evaluation committees, composed of OAG officials, will evaluate the proposals received under each of the two types of services, English editorial services and French editorial services.
- 4.1.2 **Step 1:** The first Evaluation Committee will confirm compliance with all mandatory requirements identified in section 3.3 and Appendix D (Table 6).
- 4.1.3 **Step 2:** Technical proposals deemed compliant in Step 1 will then be evaluated by the second Evaluation committee, as per the rated requirements, criteria, and point structure identified in Appendix D (Table 7). The points available in each section of the rated requirements are provided below in Table 4. Any technical proposals receiving less than fifty (50) points will be considered non-compliant and will not proceed to Step 3.

Table 4 Rated Requirements

	Total Points Available	Percentage
Step 1: Mandatory requirements	0	
Step 2: Total Technical Proposal Proponent's rated requirements	100 (*Minimum required points 50)	70%
Step 3: Total Financial Proposal	43	30%
TOTAL Score	143	100%

- 4.1.4 **Step 3:** Technical proposals deemed to be compliant following steps 1 and 2 will have their financial proposals evaluated by the OAG Contracting Authority.
- 4.1.5 For financial evaluation purposes, the overall weighted average of per hour rates will be used (Table 3). Full points (43/43) will be awarded within each service stream to the proponents with the lowest overall weighted average rate. Fewer points will be

awarded to all other proponents based on the percentage differential of their total overall weighted average rate from that of the lowest overall rate. The calculation will be as follows:

$$\frac{\text{Lowest Overall Weighted Average Rate (\$)}}{\text{Proponent's Overall Weighted Average Rate (\$)}} \times 43 = \text{Points for Financial Proposal}$$

- 4.1.6 The Proponent's point score on the Financial Proposal (out of forty three (43) points) will be added to the Proponent's points score on the Technical Proposal (out of one hundred (100) points) to determine the Proponent's total score for its Proposal (out of one hundred and forty three (143) points). Standing offer agreements (SOAs) will be awarded to proponents in each stream with the highest total scores.

4.2 Clarifications

- 4.2.1 In support of the evaluation process, the OAG may at its discretion

- a. hire any independent consultant to assist with the evaluation;
- b. contact any or all references supplied by the Proponent to verify and validate any information or data submitted by the Proponent;
- c. seek clarification or verify any or all information provided by proponents with respect to either the proponents' technical or financial proposals;
- d. request, prior to award of SOA, specific information with respect to any Proponent's legal and financial status; and
- e. cancel and/or reissue this RFSO at any time.

- 4.2.2 Following the RFSO closing date and time, clarification(s) of a Proponent's proposal may be required. Proponents will have three (3) working days, or such period as is specified in writing by the OAG Contracting Authority (section 1.1), in order to respond to a request for information or clarification. Failure to meet this deadline may result in the proposal being disqualified.

APPENDIX A: STANDING OFFER TERMS AND CONDITIONS

Any contract issued as a result of this request for standing offer will incorporate the following terms and conditions.

Language

The Office of the Auditor General is under the obligation to respect the spirit and letter of the Official Languages Act.

Priority of Documents

The documents specified below form part of and are incorporated into the resulting agreement. If there is a discrepancy between the wording of one document and the wording of any other document which appears on the list, the wording of the document which first appears on the list shall prevail over the wording of any document which subsequently appears on the list:

1. The contract;
2. This Request for Proposal;
3. The Proponent's proposal.

Other Contract Considerations

1. (a) Total payments under this agreement will not exceed the contract value, exclusive of the Applicable Taxes on the supply of services. Payment by the Auditor General shall be made within thirty (30) days of the date the Contractor's invoice is received.

(b) The Contractor will render accounts on a monthly basis during the term of this agreement showing separately, hours worked, periods and cost of travel and living expenses. For administrative purposes the Auditor General requires the Contractor to advise on a weekly basis hours worked.

(c) At any time during the contract period, the parties may agree that the services to be provided or the work to be carried out have been or will be substantially or entirely performed for an amount less than the agreement limit. In such a case, the Auditor General may inform the Contractor of its intention to amend the agreement to reduce the maximum amount of the agreement limit.

(d) The Auditor General shall provide at least 14 days' notice of its intention to reduce the maximum amount of the agreement limit and upon the expiry of the 14 day

period the parties agree that the amended amount is the maximum amount of the agreement limit. The Contractor will be entitled to claim for services provided up to the amended maximum amount of the agreement limit.

2. The Auditor General will pay to the Contractor the Applicable Taxes on the supply of services. The Contractor will remit to the Receiver General, in accordance with the provisions of the Excise Tax Act, the Applicable Taxes received in respect of the supply of services under this agreement.

3. This agreement may be terminated:

(a) If the Contractor dies or becomes incapacitated;

(b) by either party hereto upon 30 days' notice of termination in writing; or

(c) forthwith by the Auditor General by notice in writing if, in its sole and unfettered discretion, determines that the services of the Contractor hereunder are not satisfactory.

4. In the event that the assigned individual(s) is unable to complete the work to the satisfaction of the Auditor General, the Contractor will provide, subject to the concurrence of the Auditor General, an alternate with the requisite expertise to complete the assignment.

5. This agreement is a contract for the performance of a service, and the Contractor is engaged under the contract as an independent Contractor for the sole purpose of providing a service. Neither the Contractor nor the Contractor's personnel, if applicable, is engaged by the contract as an employee, servant or agent of Her Majesty. The Contractor agrees to be solely responsible for any and all payments and/or deductions required to be made, including those required for Canada or Quebec Pension Plans, Employment Insurance, Workers' Compensation, or Income Tax.

6. The Contractor shall treat all information that comes to his/her attention by virtue of carrying out the work under this agreement as privileged and confidential and will not disclose it to any third party either during the course of or after termination of this agreement except as may be necessary to perform the duties hereunder.

7. The Contractor agrees that all documents, reports, papers or other matters produced by the Contractor pursuant to the services provided or to be provided hereunder shall be the sole and exclusive property of Her Majesty and shall not be disclosed for any purpose to any third party without the prior written permission of the Auditor General or delegate.

8. The Contractor agrees to abide by the laws of Canada, including laws relating to copyright and specifically agrees not to transfer or copy by any electronic or other means any software owned by or licensed to the Office of the Auditor General. The Contractor also agrees that such software is only to be used for the purposes of work carried out on behalf of the Office of the Auditor General and for no other purpose.

9. The Contractor declares that, on or before entering into the contract, he/she has not, directly or indirectly, paid or agreed to pay and will not, directly or indirectly, pay a contingency fee to any individual for the solicitation, negotiation or to obtain the contract if the payment of the fee requires the individual to file a return under section 5 of the *Lobbyists Registration Act*.
10. The Contractor declares that, on or before entering into the contract, he/she has not been convicted of an offence, other than an offence for which a pardon has been granted, under section 121, 124 or 418 of the *Criminal Code*.
11. The Contractor consents, in the case of a contract with a value in excess of \$10,000 (including taxes), to the public disclosure of basic information, other than information described in any of paragraphs 20(1) (a) to (d) of the *Access to Information Act*, relating to the contract.
12. If the Contractor consents, in the case of a contract with a value in excess of \$10,000 (including taxes) to the public disclosure of basic information with respect to being a former public servant in receipt of a pension under the *Public Service Superannuation Act*, in accordance with the *Guidelines on the Proactive Disclosure of Contracts*.
13. If the Contractor makes a false declaration under *paragraph 9 or 10* or fails to comply with the terms set out in *paragraph 11 or 12*, the Contractor agrees to immediately return any advance payments and the contracting authority may terminate the contract.
14. The Contractor agrees that his/her activities in any workplace of the Auditor General shall not endanger the health and safety of employees of the Auditor General.
15. No Member of the House of Commons shall be admitted to any part of this agreement or to any benefit arising therefrom.
16. The Contractor acknowledges having received and read the “Code of Values, Ethics & Professional Conduct for the Office of the Auditor General of Canada” and agrees to be bound to its terms. In accordance with the Code, the Contractor agrees that he/she has discussed with the Office all actual and potential conflicts of interest that may affect his/her work with the Office.
17. The Contractor shall not assign the benefit or burden of this agreement to any other person, firm or company.
18. This agreement shall for all purposes be governed by and construed in accordance with the laws of the Province of Ontario.
19. In accordance with the Financial Administration Act, payment under the contract is subject to an appropriation for the particular service for the fiscal year in which any commitment hereunder would come in course of payment.

20. **Resource Replacement and Substitution**

- i. The Contractor must provide the services of the resources named in the proposal to perform the work, unless the Contractor is unable to do so for reasons beyond his/her control. Should the Contractor at any time be unable to provide the services of **the resource(s)** named in the proposal, the Contractor shall be responsible for providing replacement resources at the same cost, who shall be of equal or greater ability or attainment, and whom shall be acceptable to the OAG Project Authority.
- ii. In advance of the date upon which any replacement resources are to commence work, the Contractor shall notify the OAG, in writing, of the reason for the unavailability of the resource(s) named in the Contract. The Contractor shall then provide to the OAG the name(s), detailed resumé(s) listing the qualifications and experience of the proposed replacement resources, and proof that the resource has the required security clearance granted by Canada, if applicable. Should the proposed replacement resource not meet or exceed the ability/attainment of the resource for whom they are proposed to replace, the OAG reserves the right to refuse the proposed replacement resource. Under no circumstances shall the Contractor allow performance of the services by replacement resources that have not been duly authorized by the OAG.
- iii. The OAG, upon written notice, may request that the Contractor replace any resource whose services are deemed unsatisfactory in the OAG's exclusive opinion. The Contractor will have two **(2)** working days to provide a suitable replacement. In the event that the Contractor is unable to comply with the above, OAG may, at its discretion, terminate the services related to the contract at no cost to the OAG for any unsatisfactory services.
- iv. If the Contractor is unable to provide the services of a resource that is of similar or greater ability or attainment and is acceptable to the OAG, the OAG will select another available Contractor.

21. The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will:

- i. On request, and consent of the parties, participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute.
- ii. Review a complaint filed by the Contractor respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute.

The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa-opo@boa-opo.gc.ca

APPENDIX B—REQUIRED DECLARATIONS & CERTIFICATIONS

The following declarations **must** be completed as appropriate and **must** be signed by an authorized official. This appendix must be submitted as part of the Proponent's technical proposal. The OAG **WILL** declare any proposal non compliant if it is not complete or signed.

1. Proponent's Business Information

Proponent's **must** supply the following information:

Legal name of Proponent	
Proponent's business address (including street address, city, country and postal code or their equivalents).	
Proponent's telephone and fax numbers	
Point of contact for proposal and any resulting contract (name, telephone and fax numbers and email address).	
Proponent's business number (PBN) and/or GST/HST number.	

2. Proposal Validity Period

The Proponent certifies that their proposal is valid in all respects for a period of not less than 180 days from the closing date of the RFSO

3. Employment Equity

The Federal Contractors Program for Employment Equity requires that some organizations bidding for federal government contracts make a formal commitment to implement the employment equity, as a pre-condition to the validation of their bids. All proponents must check the appropriate box(es) below. Failure to do so **WILL** render the proposal non-responsive.

Program requirements do not apply for the following reason(s):

- bid is less than \$200,000.00;
- this organization has fewer than 100 permanent part-time and/or full-time employees;
- this organization is a federally regulated employer;

or, program requirements do apply:

- copy of signed Certificate of Commitment is enclosed, or
- Certificate number is:

Note: The Federal Contractors Program for Employment Equity applies to Canadian-based proponents only.

4. Certification of Education and Experience

The Proponent certifies that all statements made with regard to the education and the experience of individuals proposed for completing the subject work are accurate and factual, and we are aware that the Office of the Auditor General of Canada reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive or in other action which the OAG may consider appropriate.

5. Certification of Availability and Status of Personnel

Availability of Personnel

The Proponent certifies that, should it be awarded a contract as a result of this solicitation, the Proponent's resources who are to be assigned to a given project will be available to commence performance of the work within seven (7) days, and will remain available to perform the work.

Status of Personnel

If the Proponent has proposed any person in fulfillment of this requirement who is not an employee of the Proponent, the Proponent hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work to be performed in fulfillment of this requirement and to submit such person's résumé to the OAG. As well, the Proponent hereby certifies that the proposed person is aware that overtime may be required and is willing to comply.

During the bid evaluation, the Proponent **MUST**, upon the request of the OAG, provide a copy of such written permission, in relation to any or all non-employees proposed. The Proponent agrees that failure to comply with such a request may lead to disqualification of the Proponent's proposal from further consideration.

6. Certification of Former Public Servant in Receipt of a Pension

Is the Proponent a former public servant (FPS) in receipt of a pension under the Public Service Superannuation Act (PSSA)?

Yes () No ()

If so, the Proponent must provide the following information:

- (a) Name of public servant
- (b) Date of termination of employment or retirement from the Public Service

If the Proponent is a former public servant in receipt of a pension under the PSSA, the Proponent acknowledges and agrees that the contract with the OAG will be reported on the OAG website 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*.

A former public servant under PSSA (*) is defined as:

- (a) An individual,
- (b) An individual that has incorporated,
- (c) A partnership made of former public servants in receipt of PSSA pensions
- (d) A sole proprietorship or entity where the affected individual has a controlling (**) or major (50% + 1) interest in the entity,

(*) It does not include pensions payable pursuant to Canadian Forces Superannuation, Defence Services Pension Continuation, royal Mounted Police Superannuation, Members of Parliament Retiring Allowances and Canada Pension Plan

(**) For this purpose, “controlling” includes everyone, but not limited to organizations, bodies corporate, societies, companies, firms, partnerships, associations of persons, where individuals or directors, directly or indirectly either controls or has the power to control the other(s).

Work Force Reduction Program

Is the Proponent a former public servant who received a lump sum payment pursuant to the terms of a work force reduction program? **Yes () No ()**

If so, the Proponent must provide the following information:

- (a) Name of public servant
- (b) Conditions of the lump sum payment incentive
- (c) Date of termination of employment
- (d) Amount of lump sum payment
- (e) Rate of pay on which lump sum payment is based
- (f) Period of lump sum payment including start date, end date and number of weeks
- (g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program

A 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.

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 the Goods and Services Tax or Harmonized Sales Tax.

By submitting a proposal, the Proponent certifies that the information submitted in response to the above requirements is accurate and complete. Proposals must be signed in order to be evaluated.

AUTHORIZED SIGNATORY

Signature:

Date:

Name of Official:

APPENDIX C: PROPOSED RESOURCE CATEGORIES AND MINIMUM QUALIFICATIONS

Table 5 MINIMUM REQUIREMENTS AND QUALIFICATIONS

English Editor—Years of experience as an editor and/or reviser of translations	
1- Education	University degree(s)
2- Minimum Experience	Minimum of five (5) years as a professional editor (paid work not volunteer)
3- Project Descriptions	Provide two (2) recent project summaries that show experience editing documents of at least thirty (30) pages in length. Bilingual editors: At least one (1) of the two (2) project summaries must show experience as a reviser of translations of documents at least thirty (30) pages in length.
French Editor—Years of experience as an editor and reviser of translations	
1- Education	University degree(s)
2- Minimum Experience	Minimum of five (5) years as a professional editor (paid work not volunteer)
3- Project Descriptions	Provide two (2) recent project summaries that show experience revising translations of at least 30 pages in length

APPENDIX D: PROPOSALS EVALUATION GRIDS AND CRITERIA

1. Mandatory Requirements

Proponents’ proposals **must** meet **all** of the mandatory requirements, **as indicated below M1 to M4**, in order for their proposals to be considered for further evaluation. Failure on the part of the Proponent to meet any one (1) or more of the mandatory requirements will result in their proposal being deemed non-compliant, with the proposal being given no further consideration.

Table 6 MANDATORY REQUIREMENTS

#	MANDATORY REQUIREMENTS	Compliant		References to page #s where found in proposal
		Yes	No	
M-1	The proposal must be received as described in Section 1.1			Not Applicable
M-2	Appendix B – Required Declarations & Certifications, must be completed and must be signed by an authorized official.			
M-3	The Proponent must provide two (2) project summaries for each proposed resource as described in section 3.3.			
M-4	All proposed resources must meet the minimum requirements of the category as described in section 3.3 and Appendix C of this RFSO: <ul style="list-style-type: none"> a. Resumé for each proposed resource must be provided b. Each proposed resource must have a minimum of five (5) years experience as a professional editor (not work as a volunteer). c. Each proposed resource must have a university degree. 			

2. Rated Requirements

Proposals meeting **all** of the mandatory requirements will be evaluated and rated against the following rated requirements, based on the evaluation factors and point allocation specified. It is the responsibility of the Proponent to ensure the completeness and clarity of their proposal, ensuring they provide sufficiently detailed evidence to enable the OAG Evaluation Committee to evaluate the Proponent’s proposal on the basis of the criteria contained therein.

The Proponent’s combined score for their technical and financial proposals **must** receive a minimum score of seventy (70) points in order to be considered compliant.

Table 7 RATED REQUIREMENTS - PROPONENT

RATED REQUIREMENTS - PROPONENT	Maximum Points
<p>A. Proponent’s Experience</p> <p>A.1 The <u>two (2) project summaries</u> submitted will be evaluated on the basis of their relevance and similarity to the OAG’s requirements.</p> <p>Project summary #1 Points will be awarded based on considerations of the following elements:</p> <p>a) size, scope and complexity of the documents/projects (summary is of a document of at least thirty (30) pages). Editor must have had a significant role in at least one phase of the edit (substantive, copy editing, revision of a translation, proofreading); and</p>	5
<p>b) client references and comments received. (An OAG representative will contact the references provided. Please ensure your reference is available and willing to answer questions related to your work.)</p>	10

RATED REQUIREMENTS - PROPONENT	Maximum Points
<p>Project summary #2 Points will be awarded based on considerations of the following elements:</p> <p>a) size, scope and complexity of the documents/projects (summary is of a document of at least thirty (30) pages). Editor must have had a significant role in at least one phase of the edit (substantive, copy editing, revision of a translation, proofreading); and</p>	5
<p>b) client references and comments received. (An OAG representative will contact the references provided. Please ensure your reference is available and willing to answer questions related to your work.)</p> <p>Each project is rated based on a maximum of fifteen (15) points. (total thirty (30))</p>	10
<p>A.2 The OAG will evaluate the breadth and depth of the proposed individuals' experience, the relevance and suitability of their education, certifications, and other capabilities or qualifications.</p> <p>a) Years of experience (minimum of five (5) years experience required; one point awarded for each year of experience to a maximum of twenty (20) points)</p>	20
<p>b) Previous experience editing documents in the field of auditing (five (5) points)</p>	5
<p>c) Points awarded for one project summary showing experience as a substantive editor (five (5) points)</p>	5

RATED REQUIREMENTS - PROPONENT	Maximum Points
<p>B. Quality of the proposal Proponents' proposals should comply with the proposal numbering and content structure and page limits:</p> <p>a) maximum ten (10) pages for a proposal with one editor and a maximum of twenty (20) pages for proposals of more than one editor (to a maximum of five (5) English editors for Stream #1 or five (5) French editors for Stream #2), as described in section 3.1 of this RFSO. (10 points will be allocated if the proposal is within the limits; 2 points will be deducted for each additional page over these limits to a maximum of 10 points)</p>	10
<p>b) Resumés should not exceed three (3) pages in length (10 points will be allocated if the proposal is within the limits; 2 points will be deducted for each additional page to a maximum deduction of 10 points.)</p>	10
<p>c) Proponents should provide, within their proposal, a summary table (example in Appendix D) indicating beside each of the mandatory requirements the relevant page number(s) from their proposal that address the requirements. (10 points will be allocated if the summary table is provided and complete; 4 points will be deducted if the summary table is not provided; 2 points will be deducted if relevant page numbers are not identified; 2 points will be deducted if no list of mandatory requirements is included.)</p>	10
<p>d) Points will be deducted for poor stylistic quality, spelling and grammatical errors (2 points will be deducted per error to a maximum deduction of 10 points).</p>	10
Total—Proponent Rated Requirements	100