

**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

**Request For a Standing Offer
Demande d'offre à commandes**

Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID)

Canada, as represented by the Minister of Public Works and
Government Services Canada, hereby requests a Standing Offer
on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et
Services Gouvernementaux Canada, autorise par la présente,
une offre à commandes au nom des utilisateurs identifiés
énumérés ci-après.

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/C | Date 2014-03-20 |
| Client Reference No. - N° de référence du client EN578-13-3044 | GETS Ref. No. - N° de réf. de SEAG PW-\$\$CY-019-64893 |
| 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 2014-04-23 | |
| Time Zone Fuseau horaire Eastern Daylight Saving Time EDT | |
| Delivery Required - Livraison exigée See Herein | |
| 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 | |
| Security - Sécurité This request for a Standing Offer includes provisions for security. Cette Demande d'offre à commandes comprend des dispositions en matière de sécurité. | |

Instructions: See Herein

Instructions: Voir aux présentes

| | |
|--|--|
| 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 |

Solicitation No. - N° de l'invitation

EN578-133044/C

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

See attached document

REQUEST FOR STANDING OFFER - RFSO
STAKEHOLDER AND CITIZEN ENGAGEMENT AND CONSULATION SERVICES

REQUEST FOR STANDING OFFER – RFSO

STAKEHOLDER AND CITIZEN ENGAGEMENT AND CONSULATION ACTIVITIES

This Standing Offer excludes deliveries destined to addresses located in the Comprehensive Land Claims Agreement(s) (CLCA) areas.

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| | |
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**PART 1
GENERAL INFORMATION
STAKEHOLDER AND CITIZEN ENGAGEMENT AND CONSULATION ACTIVITIES**

1. INTRODUCTION

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments, annexes and appendices, 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 and Appendices includes the Statement of Work, the Basis of Payment and many other annexes and appendices.

2. SUMMARY

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

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 Departments and Agencies. It will be used to authorize Standing Offers (SOs).

- Authorized clients include all Departments and Agencies listed in schedules I through III of the Financial Administration Act.
- The requirement is subject the Agreement on Internal Trade (AIT).

- There is a security requirement associated with this requirement. For additional information, consult Part 6 – Security and Financial Requirements, and Part 7A – Standing Offer - Standing Offer. For more information on personnel and organization security screening or security clauses, offerors should refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.
- Offerors must submit a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2006.
- Offerors in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the Request for Standing Offers (RFSO).
- The requirement is limited to Canadian goods and/or services.
- This procurement is Set-Aside under the federal government's Procurement Strategy for Aboriginal Business, therefore this RFSO will also be used to establish a separate list of qualified Aboriginal Set-Aside Offerors under the Set-Aside Program for Aboriginal Business (SPAB).

3. SECURITY REQUIREMENT

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

4. ABORIGINAL AND NON-ABORIGINAL OFFERORS

A portion of this procurement has been set aside under the federal government's Procurement Strategy for Aboriginal Business (PSAB), as detailed in Annex 9.4 of the Supply Manual entitled "Requirements for the Set-aside Program for Aboriginal Business". This RFSO will be used to establish separate lists of SOs with both Non-Aboriginal and Aboriginal firms. Therefore, under this RFSO both Aboriginal and Non-Aboriginal firms are invited to submit an Offer under a single solicitation document.

Further to Article 1802 of the Agreement on Internal Trade (AIT), AIT does apply to the portion of this procurement set aside under the federal government's PSAB.

5. STANDING OFFERS

A Standing Offer (SO) is an offer from a supplier to Canada that allows Canada to purchase goods and/or services, or a combination of goods and services, as and when requested, during a specific period of time, through the use of a call-up process which incorporates the conditions and pricing of the Standing Offer.

A Standing Offer itself is not a contract. A separate contract is formed each time using the call-up process for the provision of goods and/or services against the qualified suppliers of the Standing Offer. When a call-up is made, it constitutes an unconditional acceptance by Canada of the supplier's offer for the provision, to the extent specified, of the goods and/or services described in the Standing Offer. Individual call-ups awarded against the Standing Offer must not exceed **\$300,000.00** (excluding GST/HST).

Two (2) separate lists of qualified suppliers (one for Non-Aboriginal and Aboriginal firms, and another for solely Aboriginal firms) will be established for the provision of Stakeholder and Citizen Engagement and Consultation Activities Services.

It is anticipated that a maximum of eight (8) Departmental Individual Standing Offers (DISOs) for each stream may result from this Solicitation for the Non-Aboriginal and Aboriginal offerors, which will be known as the « Main Stream Offerors ».

It is also anticipated that a maximum of three (3) Departmental Individual Standing Offers (DISOs) for each stream may result from this Solicitation for the solely Aboriginal offerors, which will be known as the « Aboriginal Set-Aside Offerors ».

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.

Offerors may bid either on Stream A or Stream B and/or Stream C. However, Offerors must clearly indicate which stream of service they are bidding on. Offers 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.

The Streams are identified as follows:

Stream A - Services for In-person Stakeholder and Citizen Engagement activities and consultation. 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, roundtables, workshops, town hall meetings, dialogue sessions, advisory boards and partnerships meant to influence decision-making. See details of the Statement of Work at Annex "A2".

Stream B - Services for Online Stakeholder and Citizen Engagement activities and consultation. 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. See details of the Statement of Work at Annex "A3".

Stream C - Services for In-person and Online Stakeholder and Citizen Engagement activities and consultation. 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. See details of the Statement of Work at Annex "A4".

6. 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. Debriefings are normally provided in writing.

PART 2 OFFEROR INSTRUCTIONS

1. STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<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 below:

**Bids must be submitted by 2:00 pm Eastern Standard Time on
Wednesday, April 23rd, 2014 to:**

Bid Receiving (HQ)
Department of Public Works and Government Services
Bid Receiving Unit
Portage III, 0A1
11 Laurier Street
Gatineau, Quebec
For couriers: J8X 4A6 For regular mail: K1A 0S5
Telephone (819) 956-3370
Fax No.: (819) 997-9776

Due to the nature of the Request for Standing Offer, transmission of offers by facsimile or electronic mail 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:

- (1) name of former public servant;
- (2) 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:

- (1) name of former public servant;
- (2) conditions of the lump sum payment incentive;
- (3) date of termination of employment;
- (4) amount of lump sum payment;
- (5) rate of pay on which lump sum payment is based;
- (6) period of lump sum payment including start date, end date and number of weeks;
- (7) 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, 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 the province of Ontario.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the offerors.

PART 3 OFFER PREPARATION INSTRUCTIONS

1. OFFER PREPARATION INSTRUCTIONS

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

Section I: Technical Offer (six (6) hard copies and one (1) soft copy on CD or USB key)
Section II: Financial Offer (one (1) hard copy and one (1) soft copy on CD or USB key)
Section III: Certifications (one (1) 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 they are submitting a bid for, as outlined in Annex "A" - Statement of Work. Each service stream will be evaluated separately.

Where an offeror is submitting a bid for more than one service stream, the bidder may submit only one bid, 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 (RFSO) 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 are fully described in Annex "D"

1.2 Financial Evaluation

Financial evaluation criteria are fully described in Annex "D"

2. BASIS OF SELECTION

2.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the Request for Standing Offer; and
- (b) meet all mandatory technical criteria; and
- (c) obtain the required minimum of 70 percent of the available points for each rated criteria per Stream. As each Stream is performed on a different scale, please refer to Annex "D" for full details.
 - The rating is performed on a scale of 660 points for Stream A;
 - The rating is performed on a scale of 860 points for Stream B; and
 - The rating is performed on a scale of 1520 points (660 points + 860 points) for Stream C.

2.2 Bids not meeting (a), (b) and (c) will be declared non-responsive.

2.3 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.

2.4 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%.

2.5 To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

2.6 For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

2.7 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 for « Main Stream Offers » and for each service stream, the three (3) responsive bid(s) with the highest combined rating of technical merit and price for solely Aboriginal offerors will be recommended for award of a Standing Offer for « Aboriginal Set-Aside Offerors ».

PART 5 CERTIFICATIONS

Offerors must provide the required certifications and associated information 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 in carrying out any of its obligations under any resulting contracts, if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly 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 and to cooperate with any request or requirement imposed by the Standing Offer Authority may render the Offer non-responsive, may result in the setting aside of the Standing Offer or constitute a default under the Contract.

1. CERTIFICATIONS REQUIRED PRECEDENT TO ISSUANCE OF A STANDING OFFER AND CERTIFICATIONS REQUIRED WITH THE OFFER

1.1 Certifications Required Precedent to Issuance of a Standing Offer

1.1.1 Integrity Provisions - Associated Information

By submitting an offer, the Offeror certifies that the Offeror and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Offer of Standard Instructions 2006. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.1.2 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 [Employment and Social Development Canada-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.

1.2 Certifications Required with the Offer

Offerors must submit the following duly completed certification with their offer:

1.2.1 Canadian Content Certification

1.2.1.1 SACC Manual clause A3050T (2010-01-11) Canadian Content Definition

This procurement is limited to Canadian services.

The Supplier certifies that:

() the service offered is a Canadian service as defined in paragraph 4 of clause A3050T.

Signature

Date

1.2.2 Set-aside for Aboriginal Business

An offeror wishing its offer to be considered for set aside for Aboriginal business under the federal government's Set-aside Program for Aboriginal Business must complete and sign the certification below entitled "Certification – Requirements for the Set-Aside Program for Aboriginal Business".

By executing the certification, the Offeror warrants that it is an Aboriginal business as defined in the Set-aside Program for Aboriginal Business.

Certification – Requirements for the Set-Aside Program for Aboriginal Business

1. This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business, as detailed in [Annex 9.4: Requirements for the Set-aside Program for Aboriginal Business](#), of the *Supply Manual*.
2. The Offeror:
 - i. certifies that it meets, and will continue to meet throughout the duration of the Offer, the requirements described in the above-mentioned annex.
 - ii. agrees that any subcontractor it engages under the Offer must satisfy the requirements described in the above-mentioned annex.
 - iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.
3. The Offeror must check the applicable box below:
 - i. () The Offeror is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.
OR
 - ii. () The Offeror is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.
4. The Offeror must check the applicable box below:
 - i. () The Aboriginal business has fewer than six full-time employees.
OR
 - ii. () The Aboriginal business has six or more full-time employees.
5. The Offeror must, upon request by Canada, provide all information and evidence supporting this certification. The Offeror must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Offeror must provide all reasonably required facilities for any audits.
6. By submitting an offer, the Offeror certifies that the information submitted by the Offeror in response to the above requirements is accurate and complete.

Signature

Date

PART 6 SECURITY AND FINANCIAL REQUIREMENTS

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 7 – 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;
 - (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 refer to the Canadian Industrial Security Directorate (CISD), Industrial Security Program of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

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 (PWGSC).

- 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 performed 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) (<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 (2014/03/01) 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, 2016.

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, 2016 to March 31, 2017 and from April 1, 2017 to March 31, 2018 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
Public Works and Government Services Canada
Acquisitions Branch
Services and Specialized Acquisitions Management Sector (SSAMS)
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 each 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 techniques 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:

Name :
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

This Standing Offer excludes deliveries destined to addresses located in Comprehensive Land Claims Agreement(s) (CLCA) areas.

8.1 Pool of Offerors

PWGSC - Communications Procurement Directorate (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 using the selection methodology specified in 8.3 below.
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 must maintain an Internet site that is accessible by Client Departments and Agencies with information on its qualifications and available services. If the Standing Offer Holder's Website specifically refers to products available on its Standing Offer, the information

presented must be accurate. The Standing Offer Holder's Website must not suggest that other services, not offered and/or approved by PWGSC for supply against this Standing Offer, 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 Standing Offer, the Standing Offer will prevail.

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

8.3 Selection Methodology

8.3.1 Selection Methodology for the " Main Stream Offerors "

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 any 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 the evaluation of the contractor's expertise.

d) If a Standing Offer holder, furthest away from his share, has been not 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.

e) The selection methodology may vary based on the number of Standing Offers issued. For example:

- If PWGSC awards six (6) or seven (7) Standing Offers, all subsequent call-ups against a Standing Offer can be made with any of the three (3) SO Holders that are furthest away from their proportional shares as determined; or
- If PWGSC awards five (5) or fewer Standing Offers, all subsequent call-ups against a Standing Offer can be made with any 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.

8.3.2 Selection Methodology for the " Aboriginal Set-Aside Offerors "

a) A proportional share of the total business will be assigned for each of the top three (3) Standing Offer Holders based on the highest total score for each Stream A, B and C.

b) For each Stream, the first three (3) 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 any of the three (3) SO Holders. The Project Authority, in consultation with PWGSC, will make the individual selection based on the evaluation of the contractor's expertise.

d) If a Standing Offer holder, furthest away from his share, has been not 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.

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 the following documents to PWGSC - CPD:
 - Requisition for Goods and Services (9200);
 - the Statement of Work specific to their requirement; and
 - 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. 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. If the requirement is deemed urgent, the turnaround time could be shorter.
- d) 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. If the requirement is deemed urgent, the turnaround time could be shorter.
- e) 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.
- f) 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 (Annex “B”).
- g) 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.
- h) The Standing Offer Holder must adhere to delivery deadlines as negotiated and specified in the call-up against a Standing Offer.
- i) The Standing Offer Holder will not undertake any of the specified Work unless and until the CPD Contracting Authority issues a call-up against a Standing Offer. Any work commenced prior to the receipt of a call-up will be the sole responsibility of the Standing Offer Holder.
- j) Should the Standing Offer Holder be unable to carry out the proposed services on time or unable to finalize the requirement, as agreed upon, the Project Authority will be authorized to select another Standing Offer Holder by using the Selection Methodology and the Call-up Process specified in 8.3 and 8.4 above.

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 excluded).

11. PRIORITY OF DOCUMENTS

If there is a discrepancy between the wording of any documents that appear on the following 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 (2014/03/01), 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 (2014/03/01), 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

The continuous compliance with the certifications provided by the Offeror with its offer and the ongoing cooperation in providing associated information are conditions of issuance of the Standing Offer (SO). Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO. If the Offeror does not comply with any certification, fails to provide the associated information, 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 |
| M3060C | 2008/05/12 | Canadian Content Certification |
| W0002D | 2000/12/01 | Delivery Requirements Outside a Comprehensive Land Claims Settlement Area |

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 the province of Ontario.

14. ADMINISTRATION OF STANDING OFFER

14.1 Conditions of Holding a Standing Offer

The SO Holder acknowledges that it is a condition of this Standing Offer that:

- (a) The Offer and its joint venture members, as applicable, must continue to meet all the qualification requirements described in RFSO EN578-133044/C while it has a Standing Offer.
- (b) All certifications made in the Offeror's original Offer be true on the date of this Standing Offer and remain true throughout the Standing Offer Period. The Offeror acknowledges that Canada is entitled to verify these certifications throughout the Standing Offer Period: and
- (c) The Offeror acknowledges that all online projects resulting from Standing Offer are required to meet Government of Canada Web Standards on accessibility and usability and any standards or guidelines developed by the department or agency for whom the work is being performed. The Offeror attests to their capacity to work with departmental officials in testing and troubleshooting the project to meet all applicable standards.

Canada may verify compliance with these conditions at any time during the Standing Offer and failure to meet any of these conditions constitutes grounds for setting aside authority to use this Standing Offer.

14.2 On-going Qualification Requirement

(a) The Offeror or joint venture members must immediately notify the Standing Offer Authority if it no longer meets any of the mandatory qualification requirements of this Standing Offer.

(b) PWGSC may require a SO Holder to confirm its qualification at any time. For example the SO Authority may require a SO Holder to provide evidence that:

- i. The insurance it carries continues to meet the RFSO requirement EN578-133044/C
- ii. It continues to hold the necessary security clearance
- iii. It continues to have the technical ability and experience required to deliver the services for which it is qualified
- iv. The joint venture membership remains as stated in the Standing Offer

(c) Where the Offeror no longer meets any of the individual requirements for qualification, Canada may reserve the right to:

- i. Put aside the Standing Offer in its entirety until the Offeror has demonstrated that it meets the requirements in respect of which it has been found deficient, during which time the Offeror will not be eligible for call-ups issued under the Standing Offer;
- ii. Put aside the Offeror qualification under a specific stream of the Standing Offer until the SO Holder has demonstrated that it meets the requirements in respect to which it has been found deficient, during which time the Offeror will not be eligible for call-ups issued under the Standing Offer framework for that stream,

14.3 Withdrawal of Authority to use Standing Offer

Canada may, at any time, withdraw authority from a Department or an Agency to use this Standing Offer.

14.4 Vendor Performance and identified Users Assessment

As stated under the section entitled "On-going Qualification Requirement" above, Canada reserves the right to put aside an Offeror's Standing Offer.

At the completion of each-call up, the Project Authority may assess the Offeror and Offeror's resources by completing the SO Holder Performance Report (sample attached as Annex "F"). The completed report will be sent electronically to the SO Authority.

The following is not an exhaustive list of examples of situations which may result in the put aside of the Standing Offer include:

1. Delayed completion of required services;
2. Performance quality (e.g. services rendered not in accordance with the scope of work identified in the call-up);
3. Price revision;
4. Violation of any of the specific terms and conditions detailed in the Standing Offer (e.g. failure to meet the minimum RFSO requirements, failure to respect the contract limitations, etc.);
5. Canada has terminated any contract resulting from the Standing Offer for default
6. Canada has imposed measures on the Offeror under the PWGSC Vendor Performance Policy (or such similar policy as may be in place from time to time);
7. Distribution or publication of information that conflicts with any aspect of the terms and conditions, pricing, or availability of systems currently listed in this Standing Offer.

14.5 Termination of Individual Call-up made under this Standing Offer

If a call-up made under this SO is terminated, such termination does not affect the Standing Offer. The Offeror acknowledges, however, that a default under any contract made under this Standing Offer may result in the termination of this Standing Offer, at the discretion of the Standing Offer Authority.

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 (2014/03/01), 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, including all backup servers, or, if the Contracting Authority has first consented in writing, in another country where:
 - (1) 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
 - (2) 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.
2. 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.
3. 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).
4. 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.

5. 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.
6. 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.
7. 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 \$ _____., 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:
 - (1) when it is 75 percent committed, or
 - (2) four (4) months before the contract expiry date, or

(3) 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:

- (1) A copy of time sheets to support the time claimed;
- (2) A copy of the release document and any other documents as specified in the Contract;
- (3) A copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- (4) A copy of the monthly progress report.
2. Invoices must be distributed as follows:
- (1) The original and one (1) copy must be forwarded to the following address for certification and payment. (to be determined at call-up issuance.
- (2) 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) |
| B2008C | 2013//11/06 | Government of Canada Web and Email Standards |
| C0705C | 2010/01/11 | Discretionary Audit |

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 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.

9.3 Technical Authority

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

The Technical Authority named above is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however the Technical 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 contract amendment issued by the Contracting Authority.

9.4 Offeror's Representative

The Offeror's Representative for the Standing Offer will be identified in each Call-up against the Standing Offer.

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: 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"
STATEMENT OF WORK**

In order to ensure that each Stream is well defined, the Statement of Work is divided into four sub-divisions;

- Annex "A1" - General Information**
- Annex "A2" – Stream A**
- Annex "A3" – Stream B**
- Annex "A4" – Stream C**

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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 these 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 three (3) streams:

1. Stream A - Services for In-person Stakeholder and Citizen Engagement and Consultation Activities;
2. Stream B - Services for Online Stakeholder and Citizen Engagement and Consultation Activities; and
3. Stream C - Services for In-person and Online Stakeholder and Citizen Engagement and Consultation Activities.

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

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. roundtables 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", Annex "A3" and Annex "A4" 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", Annex "A3" and/or Annex "A4".

A1.4 DELIVERABLES

The Project Authority and/or Technical Authority 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 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, videoconference 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 Authority 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, the Project Authority or Technical Authority 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 Authority, 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 Authority.

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.

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", Annex "A3" and Annex "A4", 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 Authority responsibilities:

The Project Authority and Technical Authority 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", Annex "A3" and Annex "A4" 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, Annex "A3" for Online Stakeholder and Citizen Engagement and Consultation Activities and Annex "A4" for In-Person and 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.

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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 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"
STATEMENT OF WORK
STREAM A**

**SERVICES FOR IN-PERSON STAKEHOLDER AND
CITIZEN ENGAGEMENT AND CONSULTATION ACTIVITIES**

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 "E" 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 their 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

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;
 - Target Audiences;
 - Public 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/behavioral based questionnaires seeking to collect factual or behavioral 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

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

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/behavioral-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

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 In-Person Facilitation Services

The designated resource providing In-person 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) Take notes at all sessions.

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

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

- a) Conduct data 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;
 - Quantitative analysis on factual/behavioral-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, recommendations for improvements 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. Specific information will be provided at the Call-up stage:

- 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>
- 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 Travel, Hospitality, Conference and Event Expenditures: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>
- 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), and/or International Association of Facilitators.
<http://www.iap2.org/>

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- 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"
STATEMENT OF WORK
STREAM B**

**SERVICES FOR ONLINE STAKEHOLDER AND
CITIZEN ENGAGEMENT AND CONSULTATION ACTIVITIES**

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

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, 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;
 - Target audiences;
 - Public environmental scan;
 - Proposed electronic methodology(ies) along with rationale and techniques considered;
 - Activities, deliverables and timelines;
 - Expected outcomes/results;
- d) 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;
- e) 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/behavioral-based questionnaires and other data collection tools used for a two-way discussion between participants and the Government of Canada representative(s),
- f) 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 crowd sourcing, 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;
- g) Evaluation framework describing evaluation objectives, indicators and evaluation tools to be used;
- h) Recommendations based on feedback received from the evaluation; and
- i) Provide other advice and guidance relating to online stakeholder and citizen engagement/consultation services, as required.

A3.1.2. Project Management

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.

A 3.1.3 Computer and Information Systems

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

A3.1.3.1 Development of Online Presence

- 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 Authority 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/behavioral 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 Authority prior to the implementation of the engagement/consultation activity and make and verify all corrections identified by the Technical Authority prior to the engagement/consultation launch date.

A3.1.3.2. Testing of the Online Presence

- 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.

A3.1.3.3. Execution of Online Stakeholder and Citizen Engagement and Consultation

- a) 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.
- b) The Contractor shall provide troubleshooting and technical support services to participants, including but not limited to issues of web accessibility for people with disabilities.

A3.1.4 Content Development

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/behavioral-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.
- d) 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 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.

A 3.1.5 Online Facilitation Services

The designated resource providing online facilitation services will 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) Prepare an online facilitator's guide and/or a participant guide to ensure that the objectives of the call-up are fulfilled;
- c) Conduct online facilitation of the stakeholder and/or citizen engagement activities by generating dialogue between participants and the decision-making body (i.e GC) ;

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

- In various types of online engagement platforms (e.g. chats, message forums etc.)
- With audiences of a 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, and 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).

A 3.1.6 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 data 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/behavioral-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. Specific information will be provided at the Call-up stage:

- 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 Identity Program Policy: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12314>
- 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 Travel, Hospitality, Conference and Event Expenditures: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>
- 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), or the International Association of Facilitators.
<http://www.iap2.org/>
- b) The information or data related to a call-up under this RFISO 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 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 "A4"
STATEMENT OF WORK
STREAM C**

**SERVICES FOR IN-PERSON AND ONLINE STAKEHOLDER AND
CITIZEN ENGAGEMENT AND CONSULTATION ACTIVITIES**

Services for In-person and Online Stakeholder and Citizen Engagement and Consultation Activities are for projects using a combination of In-person and Online stakeholder and citizen engagement and consultation activities.

A call up may include any or all of the activities specified under Annex "A2" and Annex "A3". In order to not be repetitive, please refer to these documents for the full details.

ANNEX "B" BASIS OF PAYMENT

NOTE TO OFFERORS:

Offerors must submit an hourly rate for each of the Services Categories of each Stream (Stream A, B and/or C) for which they are proposing their services.

The Offeror 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 also be used in the evaluation process of this Request For Standing Offer.

B.1 HOURLY RATES FOR THE STANDING OFFER FOR: STREAM A (Services for In-person Stakeholder and Citizen Engagement and Consultation Activities)

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 any applicable taxes. 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 | HOURLY RATE FOR CONTRACT PERIOD | HOURLY RATE FOR OPTION PERIOD 1 | HOURLY RATE FOR OPTION PERIOD 2 |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Expert and Strategic Advice | \$ | \$ | \$ |
| Project Management | \$ | \$ | \$ |
| Content Development | \$ | \$ | \$ |
| Logistics Planning's | \$ | \$ | \$ |
| In-Person Facilitation Services | \$ | \$ | \$ |
| Data Analysis and Reporting | \$ | \$ | \$ |

B.1.1 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditures reasonably and properly incurred (e.g. equipment, rental, material, translation, hospitality, etc) 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.1.2 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. 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.

B.1.3 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 "travelers", rather than those referring to "employees".

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

All payments are subject to government audit.

B.1.4 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.

B.2 HOURLY RATES FOR THE STANDING OFFER FOR: STREAM B
 (Services for Online Stakeholder and Citizen Engagement and Consultation Activities)

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 any applicable taxes. 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 | HOURLY RATE FOR CONTRACT PERIOD | HOURLY RATE FOR OPTION PERIOD 1 | HOURLY RATE FOR OPTION PERIOD 2 |
|----------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Expert and Strategic Advice | \$ | \$ | \$ |
| Project Management | \$ | \$ | \$ |
| Computer and Information Systems | \$ | \$ | \$ |
| Content Development | \$ | \$ | \$ |
| Online Facilitation Services | \$ | \$ | \$ |
| Data Analysis and Reporting | \$ | \$ | \$ |

B.2.1 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditures reasonably and properly incurred (e.g. equipment, rental, material, translation, hospitality, etc) 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.2.2 DIRECT EXPENSES

The professional fees submitted in B.2 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. 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.

B.2.3 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 "travelers", rather than those referring to "employees".

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

All payments are subject to government audit.

B.2.4 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.

B.3 HOURLY RATES FOR THE STANDING OFFER FOR: STREAM C
 (Services for In-Person and Online Stakeholder and Citizen Engagement and Consultation Activities)

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 any applicable taxes. 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 | HOURLY RATE FOR CONTRACT PERIOD | HOURLY RATE FOR OPTION PERIOD 1 | HOURLY RATE FOR OPTION PERIOD 2 |
|----------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Expert and Strategic Advice | \$ | \$ | \$ |
| Project Management | \$ | \$ | \$ |
| Computer and Information Systems | \$ | \$ | \$ |
| Content Development | \$ | \$ | \$ |
| Logistics Planning | \$ | \$ | \$ |
| In-Person Facilitation Services | \$ | \$ | \$ |
| Online Facilitation Services | \$ | \$ | \$ |
| Data Analysis and Reporting | \$ | \$ | \$ |

B.3.1 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditures reasonably and properly incurred (e.g. equipment, rental, material, translation, hospitality, etc) 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.3.2 DIRECT EXPENSES

The professional fees submitted in B.3 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. 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.

B.3.3 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 "travelers", rather than those referring to "employees".

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

All payments are subject to government audit.

B.3.4 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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ANNEX "C"
SECURITY REQUIREMENTS CHECK LIST

Will be provided with any resulting Standing Offer.

ANNEX "D" TECHNICAL AND FINANCIAL EVALUATION

1.1 TECHNICAL EVALUATION – STREAM A

STREAM A: Services for In-Person Stakeholder and Citizen Engagement and Consultation Activities

1.1.1. MANDATORY TECHNICAL CRITERIA – STREAM A

MA.1 EXPERIENCE OF THE FIRM (The samples will be rated under **RA.1**)

The Offeror must submit three (3) consultation project summaries completed within the last five (5) years (as of bid closing) for in-person stakeholder and citizen engagement activities and consultation.

A consultation project is considered completed when all the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body. Please refer to Annex "E" – Relevant Terms for a complete definition.

The Services Categories are:

1. Expert and Strategic Advice (**Mandatory**);
2. Project Management (**Mandatory**);
3. Content Development;
4. Logistics Planning;
5. In-Person Facilitation Services; and
6. Data Analysis and Reporting.

- One (1) of the consultation projects must include the use of the six (6) Service Categories listed above; and
- The two (2) other requested consultation projects must include the use of at least four (4) of the Service Categories listed above. Expert and Strategic Advice and Project Management Service Categories are mandatory and must be included and detailed in all the samples provided.

MA.2 OFFEROR'S CHOICE – STREAM SELECTION

The Offeror must complete Appendix "3" – Offeror's Choice – Stream Selection in order to identify the Stream(s) for which they are providing the required services.

MA.3 INTERNET SITE

Offerors must have an Internet site that is accessible by Client Departments and Agencies. The purpose of this Internet site is to provide information on the services available and the Offeror's qualifications to provide those services. Therefore, in order to meet this mandatory requirement, the Offeror must have an Internet site and provide the active Internet address.

OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION.

1.1.2. POINT RATED TECHNICAL CRITERIA – STREAM A

RA.1 EXPERIENCE OF THE FIRM (Maximum 540 points – Minimum 336 points)

The Offeror shall be assessed against the consultation projects samples provided in accordance with **MA.1**.

The rated technical criteria of Stream A are performed on a scale of a total of 540 points. The consultation project that must include six (6) Service Categories will be scored on a scale of 180 points.

The two (2) other requested consultation projects that must include the use of at least four (4) of the Service Categories will be scored on a basic scale of 150 points each. It is important to note that up to 30 bonus points each will be allocated if the samples includes the six (6) Service Categories. The total possible score for these two (2) consultation projects is a score of 180 points each.

Offerors that fail to obtain the requested minimum of 70 percent of the available points for each rated criteria and an overall score of 336 points on a scale of 540 points will not be evaluated further and will be considered non-compliant.

To better understand the samples submitted for the mandatory criteria **MA.1**, the following information should be provided for each sample. **Please complete the Sample Template – “Proposed Project Summary Sheet” located in Appendix “1”**. Each project summary will be evaluated and scored individually; the final scores will be compiled to make the total score.

- Background Information;
- Expert and Strategic Advice (**Mandatory**);
- Project Management (**Mandatory**);
- Content Development;
- Logistics Planning;
- In-Person Facilitation Services;
- Data Analysis and Reporting; and
- Understanding and Approach.

RA.1.1 Experience of the firm (project summaries)

A consultation project is considered completed when all of the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body. Please refer to Annex “E” – Relevant Terms for a complete definition.

The Previous Experience and project summaries for Stream A evaluation process will be conducted in two (2) steps, Step 1 and Step 2:

Step 1: Evaluation of the first required consultation project summary that includes the use of the six (6) Services Categories. This sample will be evaluated on a scale of 180 points. In order to be deemed compliant a minimum 70 percent of the available points for each rated criterion and an overall passing mark of 126 points is required.

Step 2: Evaluation of the two (2) consultation project summaries that include the use of at least four (4) Service Categories. Among the four (4) chosen Service Categories, Offerors must include the following two (2) mandatory categories: (Expert and Strategic Advice, and Project Management).

NOTE: Up to 30 bonus points per sample in Step 2 could be allocated if the samples include the six (6) Service Categories. These samples will be evaluated on a scale of 180 points each. In order to be deemed compliant, a minimum of 70 percent of the available points for four (4) of the rated criteria is required and an overall passing mark of 105 points per sample.

Offerors that fail to meet the minimum points for Step 1 **OR** Step 2 will not be evaluated further and will be considered non-compliant.

The consultation projects will be evaluated on the following rated criteria:

Mandatory Service Categories:

Expert and Strategic Advice (Up to 60 points per project submitted)

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; and
- Described the challenges and solutions encountered during the strategic thinking, such as: the advice, recommendations or considerations concerning how to reach underrepresented groups and/or hard to reach populations, regional context and influence and/or adherence to policies, standards and procedures.

Project Management (Up to 60 points per project submitted)

The Offeror:

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

Optional Service Categories:

Content Development (Up to 15 points per project submitted)

The Offeror:

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

Logistics Planning (Up to 15 points per project submitted)

The Offeror:

- Described the invitation process;

- Demonstrated experience in planning and coordinating travel and hospitality arrangements;
- Demonstrated experience in providing other logistical services; and
- Described the challenges and solutions encountered during the logistics planning.

In-Person Facilitation Services (Up to 15 points per project submitted)

The Offeror:

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

Data Analysis and Reporting (Up to 15 points per project submitted)

The Offeror:

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

**RA.2 UNDERSTANDING AND APPROACH
 (Maximum 120 points – Minimum 84 points)**

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

RA.2.1 Understanding of Government Requirements (Up to 30 points)

Describes 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 A2.2, Specifications and Standards.

RA.2.2 Opportunities and Challenges (Up to 30 points)

Describes the opportunities and challenges in providing In-person stakeholder and citizen engagement and consultation activities adhering to Government of Canada requirements.

RA.2.3 Quality Assurance (Up to 30 points)

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 Offeror's approach to quality assurance.

RA.2.4 Information Security Management (Up to 30 points)

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 A2.2, Specifications and Standards.

The following table is an example of how the Technical Evaluation is performed:

| Mandatory Criteria | Offeror A | Offeror B | Offeror C | Offeror D |
|---------------------------|------------------|------------------|------------------|------------------|
| Experience of the Firm | Met | Met | Met | Met |

| | | | | |
|---|------------|------------|--------------|--------------|
| Offeror's Choice – Stream Selection | Met | Met | Met | Met |
| Internet Site | Met | Met | Met | Met |
| Rated Criteria | | | | |
| Experience of the Firm | | | | |
| Sample 1: | | | | |
| Expert and Strategic Advice (60 pts) | 42 | 42 | 60 | 60 |
| Project Management (60 pts) | 42 | 48 | 48 | 0 |
| Content Development (15 pts) | 10.5 | 12 | 15 | 0 |
| Logistics Planning (15 pts) | 10.5 | 12 | 15 | 10.5 |
| In-Person Facilitation Services (15 pts) | 10.5 | 15 | 12 | 10.5 |
| Data Analysis and Reporting (15 pts) | 10.5 | 15 | 12 | 10.5 |
| <i>Step 1- Minimum of 126 points</i> | 126 | 144 | 162 | 91.5 |
| Sample 2: | | | | |
| Expert and Strategic Advice (60 pts) | 42 | 48 | 42 | 42 |
| Project Management (60 pts) | 42 | 42 | 60 | 42 |
| Content Development (15 pts) | 10.5 | 15 | 12 | 10.5 |
| Logistics Planning (15 pts) | 0 | 0 | 12 | 0 |
| In-Person Facilitation Services (15 pts) | 10.5 | 0 | 0 | 0 |
| Data Analysis and Reporting (15 pts) | 0 | 15 | 0 | 0 |
| <i>Step 2- Minimum of 105 points</i> | 105 | 120 | 126 | 94.5 |
| Sample 3: | | | | |
| Expert and Strategic Advice (60 pts) | 42 | 42 | 48 | 42 |
| Project Management (60 pts) | 42 | 42 | 42 | 42 |
| Content Development (15 pts) | 10.5 | 10.5 | 0 | 0 |
| Logistics Planning (15 pts) | 10.5 | 10.5 | 0 | 0 |
| In-Person Facilitation Services (15 pts) | 0 | 12 | 0 | 10.5 |
| Data Analysis and Reporting (15 pts) | 0 | 12 | 10.5 | 0 |
| <i>Step 2- Minimum of 105 points</i> | 105 | 129 | 100.5 | 94.5 |
| Total Experience of the Firm (Minimum required of 336 points). | 336 | 393 | 388.5 | 280.5 |
| | | | | |
| Understanding and Approach | | | | |
| Understanding of Government Requirements (30 pts) | 21 | 21 | 24 | 21 |
| Opportunities and Challenges (30 pts) | 21 | 21 | 24 | 21 |
| Quality Assurance (30 pts) | 21 | 21 | 24 | 21 |
| Information Security Management (30 pts) | 21 | 21 | 24 | 21 |
| Total Understanding and Approach (Minimum of 84 points) | 84 | 84 | 96 | 84 |
| | | | | |
| Total for STREAM A – Minimum of 420 points | 420 | 477 | 484.5 | 364.5 |

- The Offer from Firm A is fully compliant;
- The Offer from Firm B is also fully compliant;
- The Offer from Firm C did not obtain the minimum required points for sample 3, therefore the proposal is deemed non-compliant; and

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Buyer ID - Id de l'acheteur
cy019
CCC No./N° CCC - FMS No./N° VME

- The Offer from Firm D did not obtain the minimum required points for samples 1, 2 and 3 and also did not obtain the required minimum overall score of 420 points. This Firm is deemed non-compliant.

1.1 TECHNICAL EVALUATION – STREAM B

STREAM B: Services for Online Stakeholder and Citizen Engagement and Consultation Activities

1.1.1. MANDATORY TECHNICAL CRITERIA – STREAM B

MB.1 EXPERIENCE OF THE FIRM (The samples will be rated under **RB.1**)

The Offeror must submit three (3) consultation project summaries completed within the last five (5) years (as of bid closing) for online stakeholder and citizen engagement activities and consultation.

A consultation project is considered completed when all the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body and using internet-based Web 2.0 tools and technologies. Please refer to Annex “E” – Relevant Terms for a complete definition.

The Services Categories are:

1. Expert and Strategic Advice (**Mandatory**);
2. Project Management (**Mandatory**);
3. Computer and Information Systems (**Mandatory**);
4. Content Development;
5. Online Facilitation Services; and
6. Data Analysis and Reporting.

- All three (3) consultation projects must include the use of at least four (4) of the Service Categories listed above. Expert and Strategic Advice, Project Management, and Computer and Information Systems are mandatory and must be included and detailed in each proposed sample; and
- Over the three (3) consultation projects, Offerors must demonstrate their experience in all six (6) services categories listed above.

MB.2 OFFEROR'S CHOICE – STREAM SELECTION

The Offeror must complete Appendix “3 ” – Offeror's Choice – Stream Selection in order to identify the Stream(s) for which they are providing the required services.

MB.3 INTERNET SITE

Offerors must have an Internet site that is accessible by Client Departments and Agencies. The purpose of this Internet site is to provide information on the services available and the Offeror's qualifications to provide those services. Therefore, in order to meet this mandatory requirement, the Offeror must have an Internet site and provide the active Internet address.

OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION.

1.1.2. POINT RATED TECHNICAL CRITERIA – STREAM B

RB.1 EXPERIENCE OF THE FIRM (Maximum 540 points – Minimum of 336 points)

The Offeror shall be assessed against the consultation projects samples provided in accordance with **MB.1**.

The rated technical criteria of Stream B are performed on a scale of a total of 540 points. All consultation projects will be scored on a basic scale of 160 points each. It is important to note that up to 20 bonus points for each consultation project will be allocated if the samples include the six (6) Service Categories. Therefore, the total possible score for all three (3) consultation projects is 180 points each.

Offerors that fail to obtain the requested minimum of 70 percent of the available points for each rated criteria and an overall passing mark of 336 points on a scale of 540 points will not be evaluated further and will be considered non-compliant.

To better understand the samples submitted for the mandatory criteria **MB.1**, the following information should be provided for each sample. **Please complete the Sample Template – “Proposed Project Summary Sheet” located in Appendix “2”**. Each project summary will be evaluated and scored individually; the final scores will be compiled to make the total score.

- Background Information;
- Expert and Strategic Advice (**Mandatory**);
- Project Management (**Mandatory**);
- Computer and Information Systems (**Mandatory**);
- Content Development;
- Online Facilitation Services;
- Data Analysis and Reporting;
- Understanding and Approach; and
- Compliance with Government of Canada Web Standards.

RB.1.1 Experience of the firm (project summaries)

A consultation project is considered completed when all of the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body and using internet-based Web 2.0 tools and technologies. Please refer to Annex “E” – Relevant Terms for a complete definition.

The Experience of the firm for Stream B will be conducted as follows:

All consultation project summaries will be evaluated on a basic scale of 160 points. All three (3) consultation projects must include the use of at least four (4) of the Service Categories listed above. Expert and Strategic Advice, Project Management, and Computer and Information Systems are mandatory and must be included and detailed in each proposed sample.

NOTE: Up to 20 bonus points per sample could be allocated if the samples include the six (6) Service Categories. These samples will be evaluated on a scale of 180 points each. In order to be deemed compliant, a minimum of 112 points each consultation project is required.

Offerors that fail to meet the minimum points will not be evaluated further and will be considered non-compliant.

The consultation projects will be evaluated on the following rated criteria:

Mandatory Service Categories:

Expert and Strategic Advice (Up to 50 points per project submitted)

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 concerning how to reach underrepresented groups and/or hard to reach populations, regional context and influence and/or adherence to policies, standards and procedures; and
- Explained the accommodation and participation strategy.

Project Management (Up to 50 points per project submitted)

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 that the project was delivered within constraints, on-time and within budget; and
- Described the challenges and solution in the aspect of change management and control procedures.

Computer and Information Systems (Up to 50 points per project submitted)

The Offeror:

- 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); and
- Described how the pilot test was conducted.

Optional Service Categories:

Content Development (Up to 10 points per project submitted)

The Offeror:

- Demonstrated experience in developing a variety of materials/tools to support the consultation;
- Identified the extent to which research and analysis were conducted and influenced the production of materials;
- Described the challenges and solutions encountered during the production of content development; and
- Described the approach to translation services for online consultations.

Online Facilitation Services (Up to 10 points per project submitted)

The Offeror:

- Demonstrated the facilitator's role during the consultation;
- Demonstrated how the rules of engagement were applied;
- Executed facilitation services in French and/or English;
- Demonstrated experience in the use of a variety of techniques to generate online dialogue; and
- Described the challenges and solutions encountered during the online facilitation services: such as dealing with emerging issues and unexpected or unforeseen events.

Data Analysis and Reporting (Up to 10 points per project submitted)

The Offeror:

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

**RB.2 UNDERSTANDING AND APPROACH
(Maximum 120 points – Minimum of 84 points)**

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

RB.2.1 Understanding of Government Requirements (Up to 30 points)

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 A3.2, Specifications and Standards.

RB.2.2 Opportunities and Challenges (Up to 30 points)

Describes the opportunities and challenges in providing online stakeholder and citizen engagement and consultation activities adhering to Government of Canada requirements.

RB.2.3 Quality Assurance (Up to 30 points)

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 Offeror's approach to quality assurance.

RB.2.4 Information Security Management (Up to 30 points)

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 A3.2, Specifications and Standards.

**RB.3 COMPLIANCE WITH GOVERNMENT OF CANADA WEB STANDARDS
(Maximum 200 points – Minimum of 140 points)**

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

RB.3.1 Process and Methodologies (Up to 140 points)

Explains the processes and methodologies that would be used to develop test and execute the online consultations, including how to ensure the tools and/or platforms are compliant with all Government of Canada Web Standards.

RB.3.2 Proposed Solutions (Up to 60 points)

Proposes solutions to overcome potential technical challenges related to Government of Canada Web Standards.

The following table is an example of how the Technical Evaluation is performed:

| Mandatory Criteria | Offeror A | Offeror B | Offeror C | Offeror D |
|--|------------------|------------------|------------------|------------------|
| Experience of the Firm | Met | Met | Met | Met |
| Offeror's Choice – Stream Selection | Met | Met | Met | Met |
| Internet Site | Met | Met | Met | Met |
| Rated Criteria | | | | |
| Experience of the Firm | | | | |
| Sample 1: | | | | |
| Expert and Strategic Advice (50 pts) | 35 | 40 | 35 | 0 |
| Project Management (50 pts) | 35 | 40 | 35 | 35 |
| Computer and Information Systems (50 pts) | 35 | 35 | 35 | 35 |
| Content Development (10 pts) | 0 | 7 | 0 | 0 |
| Online Facilitation Services (10 pts) | 0 | 7 | 7 | 0 |
| Data Analysis and Reporting (10 pts) | 7 | 7 | 0 | 7 |
| <i>Sample 1- Minimum of 112 points</i> | 112 | 136 | 112 | 77 |
| Sample 2: | | | | |
| Expert and Strategic Advice (50 pts) | 35 | 40 | 35 | 35 |
| Project Management (50 pts) | 35 | 35 | 0 | 0 |
| Computer and Information Systems (50 pts) | 35 | 35 | 35 | 35 |
| Content Development (10 pts) | 0 | 8 | 7 | 7 |
| Online Facilitation Services (10 pts) | 7 | 8 | 7 | 0 |
| Data Analysis and Reporting (10 pts) | 0 | 8 | 0 | 0 |
| <i>Sample 2- Minimum of 112 points</i> | 112 | 134 | 84 | 77 |
| Sample 3: | | | | |
| Expert and Strategic Advice (50 pts) | 35 | 40 | 35 | 35 |
| Project Management (50 pts) | 35 | 40 | 35 | 35 |
| Computer and Information Systems (50 pts) | 35 | 50 | 35 | 35 |
| Content Development (10 pts) | 7 | 10 | 0 | 0 |
| Online Facilitation Services (10 pts) | 0 | 10 | 0 | 0 |
| Data Analysis and Reporting (10 pts) | 0 | 8 | 7 | 0 |
| <i>Sample 3- Minimum of 112 points</i> | 112 | 158 | 112 | 105 |
| Total Experience of the Firm (Minimum required of 336 points. | 336 | 428 | 308 | 259 |
| Understanding and Approach | | | | |
| Understanding of Government Requirements (30 pts) | 21 | 24 | 24 | 21 |
| Opportunities and Challenges (30 pts) | 21 | 24 | 24 | 21 |

| | | | | |
|---|------------|------------|------------|------------|
| Quality Assurance (30 pts) | 21 | 24 | 24 | 21 |
| Information Security Management (30 pts) | 21 | 21 | 24 | 21 |
| Total Understanding and Approach (Minimum of 84 points) | 84 | 93 | 96 | 84 |
| Compliance with Government of Canada Web Standards | | | | |
| Process and Methodologies (140 pts) | 98 | 112 | 112 | 98 |
| Proposed Solutions (60 pts) | 42 | 60 | 48 | 42 |
| Total Compliance with Government of Canada Web Standards (Minimum of 140 points) | 140 | 172 | 160 | 140 |
| Total for STREAM B – Minimum of 560 points | 560 | 693 | 564 | 483 |

- The Offer from Firm A is fully compliant;
- The Offer from Firm B is also fully compliant;
- The Offer from Firm C did not obtain the minimum required points for sample 2 and did not obtain the overall passing mark of 336 points for the Experience of the Firm, therefore the proposal is deemed non-complaint; and
- The Offer from Firm D did not obtain the minimum required points for samples 1, 2 and 3 and also did not obtain the required minimum overall score of 560 points. This Firm is deemed non-compliant.

1.1 TECHNICAL EVALUATION – STREAM C

STREAM C: Services for In-Person and Online Stakeholder and Citizen Engagement and Consultation Activities

1.1.1. MANDATORY TECHNICAL CRITERIA – STREAM C

All Mandatory requirements specified under Stream A and specified under Stream B will need to be provided.

OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION.

1.1.2 POINT RATED TECHNICAL CRITERIA – STREAM C

All point rated Technical requirements specified under Stream A and specified under Stream B will need to be provided.

1.2 TECHNICAL MERIT SCORE FOR ALL STREAMS

The Technical merit score provided herein are for demonstration purposes only and are fictitious. To establish the technical merit score, the overall technical score for each responsive Offer will be determined as follows:

As the ratio for technical merit is 70%, the total number of points obtained divided by the maximum number of points available multiplied by the ratio of 70%. For example:

Firm A obtained a technical score of 420 points out of a maximum of 660 points; and
Firm B obtained a technical score of 477 points out of a maximum of 660 points.

Firm A: $420 \text{ points} / 660 \text{ points} \times 70\% = 44.55 \text{ points}$

Firm B: $477 \text{ points} / 660 \text{ points} \times 70\% = 50.59 \text{ points}$

1.3 FINANCIAL EVALUATION FOR ALL STREAMS

The figures below are for demonstration purposes only and do not represent current or expected hourly rates for In-Person and or Online Stakeholder and Citizen Engagement and Consultation Services.

The financial scores will be calculated as follows:

Step 1: For each Offeror, a combined hourly rate will be calculated by adding together the rates submitted for each Service Category for the three periods of the Standing Offer (initial 2-year period, extension period 1, extension period 2).

Step 2: An average combined rate per stream will be calculated by adding all the combined rates from all responsive offers for each Service Category divided by the total number of responsive offers received.

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

Step 4: The weighted Financial Score will be determined per stream.

$$\frac{\text{Lowest Responsive Combined Hourly Rate}}{\text{Offeror's Hourly Rate}} \times 30 = \text{Weighted Financial Score}$$

1.3.1 Example of a financial evaluation

All Streams will be evaluated in the same way – Each Stream has its Services Categories, this is an example provided to better understand how the calculations are done.

Step 1:

Firm A

| Service Categories | HOURLY RATE FOR INITIAL | HOURLY RATE FOR EXTENSION PERIOD 1 | HOURLY RATE FOR EXTENSION PERIOD 2 | COMBINED HOURLY RATE |
|-----------------------------|-------------------------|------------------------------------|------------------------------------|----------------------|
| Expert and Strategy Advice | \$25.00 | \$25.00 | \$25.00 | \$450.00 |
| Project Management | \$25.00 | \$25.00 | \$25.00 | |
| Content Development | \$25.00 | \$25.00 | \$25.00 | |
| Logistics Planning | \$25.00 | \$25.00 | \$25.00 | |
| Facilitation Services | \$25.00 | \$25.00 | \$25.00 | |
| Data Analysis and Reporting | \$25.00 | \$25.00 | \$25.00 | |

Firm B

| Service Categories | HOURLY RATE FOR INITIAL | HOURLY RATE FOR EXTENSION PERIOD 1 | HOURLY RATE FOR EXTENSION PERIOD 2 | COMBINED HOURLY RATE |
|-----------------------------|-------------------------|------------------------------------|------------------------------------|----------------------|
| Expert and Strategy Advice | \$100.00 | \$105.00 | \$110.00 | \$1,215.00 |
| Project Management | \$50.00 | \$55.00 | \$60.00 | |
| Content Development | \$50.00 | \$55.00 | \$60.00 | |
| Logistics Planning | \$75.00 | \$80.00 | \$85.00 | |
| Facilitation Services | \$50.00 | \$55.00 | \$60.00 | |
| Data Analysis and Reporting | \$50.00 | \$55.00 | \$60.00 | |

Firm C

| Service Categories | HOURLY RATE FOR INITIAL | HOURLY RATE FOR EXTENSION PERIOD 1 | HOURLY RATE FOR EXTENSION PERIOD 2 | COMBINED HOURLY RATE |
|--|-------------------------|------------------------------------|------------------------------------|----------------------|
| <u>Non-compliant - did not meet the minimum points required</u> | | | | |

Firm D

| Service Categories | HOURLY RATE FOR INITIAL | HOURLY RATE FOR EXTENSION PERIOD 1 | HOURLY RATE FOR EXTENSION PERIOD 2 | COMBINED HOURLY RATE |
|-----------------------------|-------------------------|------------------------------------|------------------------------------|----------------------|
| Expert and Strategy Advice | \$200.00 | \$200.00 | \$200.00 | \$1,375.00 |
| Project Management | \$50.00 | \$50.00 | \$55.00 | |
| Content Development | \$50.00 | \$50.00 | \$55.00 | |
| Logistics Planning | \$50.00 | \$50.00 | \$55.00 | |
| Facilitation Services | \$55.00 | \$55.00 | \$60.00 | |
| Data Analysis and Reporting | \$45.00 | \$45.00 | \$50.00 | |

Firm E

| Service Categories | HOURLY RATE FOR INITIAL | HOURLY RATE FOR EXTENSION PERIOD 1 | HOURLY RATE FOR EXTENSION PERIOD 2 | COMBINED HOURLY RATE |
|-----------------------------|-------------------------|------------------------------------|------------------------------------|----------------------|
| Expert and Strategy Advice | \$45.00 | \$50.00 | \$55.00 | \$960.00 |
| Project Management | \$65.00 | \$70.00 | \$75.00 | |
| Content Development | \$55.00 | \$60.00 | \$65.00 | |
| Logistics Planning | \$35.00 | \$40.00 | \$45.00 | |
| Facilitation Services | \$35.00 | \$40.00 | \$45.00 | |
| Data Analysis and Reporting | \$55.00 | \$60.00 | \$65.00 | |

Step 2:

| Offeror | FIRM A | FIRM B | FIRM C | FIRM D | FIRM E |
|--------------------------------------|-------------------------------------|------------|---------------|------------|----------|
| Combined rate for the Stream | \$450.00 | \$1,215.00 | Non-compliant | \$1,375.00 | \$960.00 |
| Average Combined rate for the Stream | Average = \$4,000.00 /4 = \$1000.00 | | | | |

Step 3:

| Offeror | FIRM A | FIRM B | FIRM C | FIRM D | FIRM E |
|---|----------------|------------|---------------|------------|----------|
| Average Combined rate for Stream A | \$450.00 | \$1,215.00 | Non-compliant | \$1,375.00 | \$960.00 |
| Combined hourly rates below average more than 50% below = \$500.00 | Non-responsive | | | | |
| Combined hourly rates below average more than 50% above \$1,500.00 | | | | | |

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

Step 4:

| | |
|---|-----------------|
| Lowest Responsible Combined hourly rate and financial ratio | |
| Lowest responsive Combined hourly rate: | \$960.00 |
| Financial ratio | 30.00 |

| Offeror | THE STREAM | WEIGHTED FINANCIAL SCORE |
|---------|------------|--------------------------|
|---------|------------|--------------------------|

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cy019
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| | | |
|---------------|------------|-------|
| FIRM B | \$1,215.00 | 23.70 |
| FIRM D | \$1,375.00 | 20.95 |
| FIRM E | \$960.00 | 30.00 |

1.4 EVALUATION GRIDS

The Evaluation Grids are as follows:

Stream A – See Annex “G”

Stream B – See Annex “H”

Stream C – See Both Annex “G” and Annex “H”

ANNEX "E" RELEVANT TERMS

Active Standing Offer Holders: The successful Offeror will have to possess the adequate security clearance level to perform the work described in the SOW to be considered and Active Standing Offer Holder.

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 or multi-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 Online. 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, video conferencing, webinar, 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 (POR): 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) behavioral or factual research (collection of exclusively behavioral 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 Government of Canada 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. Relationships with stakeholders are established, maintained, and nurtured. Whether it happens in day-to-day business interactions or through more formal 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).

ANNEX "F"

SAMPLE PERFORMANCE RATING FORM

| SO Holder Performance Report | | |
|---|---|-----------------------------------|
| Final _____ Interim (from: DD/MMM/YYYY) | | |
| <i>SO Holder:</i> <i>Call-up number:</i> <i>Call-up value:</i> <i>Award date:</i> <i>Required by dates(s):</i> <i>Completion date:</i> <i>Amount invoiced:</i> <i>Invoice credits:</i> | | |
| Brief Description of requirements: | | |
| Rating: Indicated by a yes or no response if SO Holder's performance complied with the requirement as stated in the Standing Offer document and detailed in the Statement of Work. | | |
| Category A | | |
| Scheduling, meetings and performance | Expert and Strategic Advise - Services performed meet the requirement as set-out in section A2.1.1 and A3.1.1 | Yes No N/A |
| | Project Management - Services performed meet the requirement as set-out in section A2.1.2 and A3.1.2 | Yes No N/A |
| | Computer and Information Systems - Services performed meet the requirement as set-out in section A3.1.3 | Yes No N/A |
| | Content Development - Services performed meet the requirement as set-out in section A2.1.3 and A3.1.4 | Yes No N/A |
| | Logistics Planning - Services performed meet the requirement as set-out in section A2.1.4 | Yes No N/A |
| | In-Person and/or Online Facilitation Services - Services performed meet the requirement as set out in section A2.1.5 and A3.1.5 | Yes No N/A |
| | Date Analysis and Reporting - Services performed meet the requirement as set-out in section A2.1.6 and A3.1.6 | Yes No N/A |
| Category B | | |
| Deliverables / Services as specified in the Call-up and in accordance with the requirements in Annex A Statement of Work of the Standing | Performance standards - meet the requirement as set-out in the Statement of Work sections that were applicable: | |
| | A2.2 Specifications and Standards | A3.2 Specifications and Standards |
| | | Yes No |

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

| | | |
|--|---|--------------|
| Offer. | | |
| Category C | | |
| Compliance with schedule and deadlines | The timelines as defined in the deliverables in the statement of Work (or amended if applied) | Yes No |
| Reporting, project and quality | The SO Holder project development and final report meet Government of Canada standards and the project objectives as detailed in the Statement of Work, including Web Standard if applicable. | Yes No |
| Administrative documents | All administrative documents received in accordance with the requirement of contract. Administrative documents can include but are not limited to: Invoices; reports, cost planning. | Yes No |
| Category D | | |
| Resources | The resources assigned to work under the Call-up meet or exceeded the Statement of Work requirements. | Yes No |
| Rating | In order to obtain a "Pass" mark, the SO Holder must meet the requirement in Categories A, B and D and two out of three requirements under category C. | Pass Fail |
| Evaluated | By: | Date: |

**ANNEX "G"
 EVALUATION GRID
 STREAM A**

| EVALUATION SUMMARY – STREAM A | |
|--|-------------------------|
| MANDATORY REQUIREMENTS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET | |
| Mandatories Checked by: | Date: |
| RATED REQUIREMENTS | SCORE ACHIEVED |
| RA.1 EXPERIENCE OF THE FIRM | |
| Consultation Project Sample 1 | ___ / 180 points |
| Consultation Project Sample 2 | ___ / 180 points |
| Consultation Project Sample 3 | ___ / 180 points |
| Sub total for RA.1 | ___ / 540 points |
| RA.2 UNDERSTANDING AND APPROACH | |
| Understanding of Government of Canada Requirement | ___ / 30 points |
| Opportunities and Challenges | ___ / 30 points |
| Quality Assurance | ___ / 30 points |
| Information Security Management | ___ / 30 points |
| Sub total for RA.2 | ___ / 120 points |
| OVERALL TOTAL | ___ / 660 points |
| Overall Comments: | |
| | |
| | |

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

EVALUATION TEAM SIGNATURES:

_____ Date: _____

NOTE TO EVALUATORS: This evaluation grid contains the basic criteria. This grid must be used in conjunction with the RFSO document to ensure the evaluation is being conducted strictly in accordance with the published criteria.

1.1 TECHNICAL EVALUATION

1.1.1 MANDATORY REQUIREMENTS

| Evaluation Criteria | Met | Not Met |
|--|-----|---------|
| The bid submission requirements of Standard Instructions 2006 are met. | | |
| The Former Public Servant information has been verified. | | |
| The Offeror has provided the address of the proposed site or premises for which Safeguard Measures are required. | | |
| The Certifications in Part 5 have been completed and signed (either upon or following bid submission). | | |
| The Security Requirements have been obtained. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

| Evaluation Criteria | Met | Not met |
|---|-----|---------|
| MA.1 EXPERIENCE OF THE FIRM (The demo samples will be rated under RA.1) | | |
| <p>The Offeror must submit <u>three (3)</u> consultation project summaries completed within the last five (5) years (as of bid closing) for in-person stakeholder and citizen engagement activities and consultation.</p> <p>A consultation project is considered completed when all the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body. Please refer to Annex "E" – Relevant Terms for a complete definition.</p> <p style="text-align: center;"><u>The Services Categories are:</u></p> <ol style="list-style-type: none"> 1. Expert and Strategic Advice (Mandatory); 2. Project Management (Mandatory); 3. Content Development; 4. Logistics Planning; 5. In-Person Facilitation Services; and 6. Data Analysis and Reporting. <ul style="list-style-type: none"> • One (1) of the consultation projects must include the use of the six (6) Service Categories listed above; and • The two (2) other requested consultation projects must include the use of at least four (4) of the Service Categories listed above. Expert and Strategic Advice and Project Management Service Categories are mandatory and must be included and detailed in all the samples provided. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

| Evaluation Criteria | Met | Not met |
|---|-----|---------|
| MA.2 OFFEROR'S CHOICE – STREAM SELECTION | | |
| The Offeror must complete Appendix "3" - Offeror's Choice – Stream Selection in order to identify the Stream(s) for which they are providing the required services. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

| Evaluation Criteria | Met | Not met |
|--|-----|---------|
| MA.3 INTERNET SITE | | |
| Offerors must have an Internet site that is accessible by Client Departments and Agencies. The purpose of this Internet site is to provide information on the services available and the Offeror's qualifications to provide those services. Therefore, in order to meet this mandatory requirement, the Offeror must have an Internet site and provide the active Internet address. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

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

1.1.2 RATED TECHNICAL CRITERIA

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. To be considered compliant, bidders must obtain the required minimum of 70 percent of the points for each rated criteria. An overall passing mark of 336 points on a scale of 540 points is required under the requirement "Experience of the Firm" and the bidders must obtain the required minimum of 84 points out of a possible 120 points under the requirement "Understanding and Approach". Proposals scoring less will not be given further consideration.

NOTE: Percentage factors will be the basis used to allocate points for all rated requirements. The number of points will be calculated depending on the total value given for each criterion. We cannot deviate from the established scoring grid. For example, we could not give a score of 0.75 (75%). We would have to choose between a 0.7 or a 0.8 (70% or 80%).

INSTRUCTIONS TO EVALUATORS

PLEASE READ THE FOLLOWING CAREFULLY AND IN ITS ENTIRETY PRIOR TO COMMENCING THE EVALUATION OF THE RATED REQUIREMENTS.

1. The following scoring grid will be used for the evaluation of the rated criteria.
2. ONLY the Percentage Factors indicated in the table are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available Percentage Factors: 1, 0.8, 0.7, 0.5, and 0. Factors such as 0.65, 0.85, etc. MUST NOT be used.
3. The "Points" and "Total Points" boxes in the grids will be calculated based on the Percentage Factor(s) assigned. Evaluators MUST NOT select a number for "Points" which does not correspond to a Percentage Factor. For example, 3/10 is not an acceptable score as 0.3 is not an available.

RA.1 EXPERIENCE OF THE FIRM
(Maximum: 540 points - Minimum: 336 points)

The Consultation Projects will be evaluated on the following rated criteria:

RA.1.1 Expert and Strategic Advice (Mandatory) (60 points per project submitted)

At a minimum we are looking for the following criteria:

- 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; and
- Described the challenges and solutions encountered during the strategic thinking, such as: the advice, recommendations or considerations concerning how to reach underrepresented groups and/or hard to reach populations, regional context and influence and/or adherence to policies, standards and procedures.

| Expert and Strategic Advice – Up to a maximum of 180 points. | | | |
|---|--------|-------------------|--------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 60 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 60 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 60 |
| Percentage factors utilized for the evaluation: | | | |
| <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7): This is the established minimum.</u> Acceptable information was provided on expert and strategic advice in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information was provided on expert and strategic advice in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information was provided on expert and strategic advice in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 180 |

RA.1.1 Project Management (Mandatory) (60 points per project submitted)

At a minimum we are looking for the following criteria:

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

| Project Management – Up to a maximum of 180 points. | | | |
|---|--------|-------------------|--------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 60 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 60 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 60 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7):</u> This is the established minimum. Acceptable information was provided on project management in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information was provided on project management in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information was provided on project management in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 180 |

RA.1.1 Content Development (Optional) (15 points per project submitted)

At a minimum we are looking for the following criteria:

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

| Content Development – Up to a maximum of 45 points. | | | |
|--|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 15 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on content development in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on content development in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on content development in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 45 |

RA.1.1 Logistics Planning (Optional) (15 points per project submitted)

At a minimum we are looking for the following criteria:

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

| Logistics Planning – Up to a maximum of 45 points. | | | |
|--|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 15 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or too basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on logistics planning in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on logistics planning in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on logistics planning in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 45 |

RA.1.1 In-Person Facilitation Services (Optional) (15 points per project submitted)

At a minimum we are looking for the following criteria:

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

| In-Person Facilitation Services – Up to a maximum of 45 points. | | | |
|--|--------|-------------------|----------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 15 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7):</u> This is the established minimum. Acceptable information was provided on in-person facilitation services in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information was provided on in-person facilitation services in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information was provided on in-person facilitation services in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 45 |

RA.1.1 Data Analysis and Reporting (Optional) (15 points per project submitted)

At a minimum we are looking for the following criteria:

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

| Data Analysis and Reporting – Up to a maximum of 45 points. | | | |
|--|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 15 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 15 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on data analysis and reporting in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on data analysis and reporting in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on data analysis and reporting in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 45 |

Total points allocated for the Consultation Project Sample 1: _____ / 180 points
 Total points allocated for the Consultation Project Sample 2: _____ / 180 points
 Total points allocated for the Consultation Project Sample 3: _____ / 180 points

Total points allocated for the Rated Criteria RA.1: _____ / 540 points

**RA.2 UNDERSTANDING AND APPROACH
 (Maximum: 120 points - Minimum: 84 points)**

The Understanding and Approach will be evaluated on the following rated criteria:

RA.2.1 Understanding of Government Requirements (30 points)

At a minimum we are looking for the following criteria:

Describes 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 A2.2, Specifications and Standards.

| Understanding of Government Requirements – Up to a maximum of 30 points. | | |
|---|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7):</u> This is the established minimum. Acceptable information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RA.2.2 Opportunities and Challenges (30 points)

At a minimum we are looking for the following criteria:

Describes the opportunities and challenges in providing In-person stakeholder and citizen engagement and consultation activities adhering to Government of Canada requirements, including Government of Canada acts, codes, regulations and policies.

| Opportunities and Challenges – Up to a maximum of 30 points. | | |
|---|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present. <u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum. <u>Acceptable (0.7)</u>: This is the established minimum. Acceptable opportunities and challenges are identified and described. A few elements might have been better detailed but there is no real impact of the assessment. <u>Good (0.8)</u>: Good opportunities and challenges are identified and described. Most or all elements were addressed and well defined. <u>Very Good (1)</u>: Complete and clear opportunities and challenges are identified and described. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RA.2.3 Quality Assurance (30 points)

At a minimum we are looking for the following criteria:

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 Offeror's approach to quality assurance.

| Quality Assurance – Up to a maximum of 30 points. | | |
|---|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RA.2.4 Information Security Management (30 points)

At a minimum we are looking for the following criteria:

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 A2.2, Specifications and Standards.

| Information Security Management – Up to a maximum of 30 points. | | |
|--|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7): This is the established minimum.</u> Acceptable information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

Total points allocated for the Rated Criteria RA.2: _____ / 120 points

**ANNEX "H"
 EVALUATION GRID
 STREAM B**

| EVALUATION SUMMARY – STREAM B | |
|--|-------------------------|
| MANDATORY REQUIREMENTS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET | |
| Mandatories Checked by: | Date: |
| RATED REQUIREMENTS | SCORE ACHIEVED |
| RB.1 EXPERIENCE OF THE FIRM | |
| Consultation Project Sample 1 | ___ / 180 points |
| Consultation Project Sample 2 | ___ / 180 points |
| Consultation Project Sample 3 | ___ / 180 points |
| Sub total for RB.1 | ___ / 540 points |
| RB.2 UNDERSTANDING AND APPROACH | |
| Understanding of Government of Canada Requirement | ___ / 30 points |
| Opportunities and Challenges | ___ / 30 points |
| Quality Assurance | ___ / 30 points |
| Information Security Management | ___ / 30 points |
| Sub total for RB.2 | ___ / 120 points |
| RB.3 COMPLIANCE WITH GOVERNMENT OF CANADA WEB STANDARDS | |
| Process and Methodologies | ___ / 140 points |
| Proposed Solutions | ___ / 60 points |
| Sub total for RB.3 | ___ / 200 points |
| OVERALL TOTAL | ___ / 860 points |
| Overall Comments: | |
| | |
| | |

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

EVALUATION TEAM SIGNATURES:

_____ Date: _____

NOTE TO EVALUATORS: This evaluation grid contains the basic criteria. This grid must be used in conjunction with the RFSO document to ensure the evaluation is being conducted strictly in accordance with the published criteria.

1.1 TECHNICAL EVALUATION

1.1.1 MANDATORY REQUIREMENTS

| Evaluation Criteria | Met | Not Met |
|--|-----|---------|
| The bid submission requirements of Standard Instructions 2006 are met. | | |
| The Former Public Servant information has been verified. | | |
| The Offeror has provided the address of the proposed site or premises for which Safeguard Measures are required. | | |
| The Certifications in Part 5 have been completed and signed (either upon or following bid submission). | | |
| The Security Requirements have been obtained. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

| Evaluation Criteria | Met | Not met |
|--|-----|---------|
| MB.1 EXPERIENCE OF THE FIRM (The demo samples will be rated under RB.1) | | |
| <p>The Offeror must submit <u>three (3)</u> consultation project summaries completed within the last five (5) years (as of bid closing) for online stakeholder and citizen engagement activities and consultation.</p> <p>A consultation project is considered completed when all the deliverables are met and approved by the client. For evaluation purposes, consultation is defined as a two-way flow of information and interactions between participants and the decision-making body and using internet-based Web 2.0 tools and technologies. Please refer to Annex "E" – Relevant Terms for a complete definition.</p> <p><u>The Services Categories are:</u></p> <ol style="list-style-type: none"> 1. Expert and Strategic Advice (Mandatory); 2. Project Management (Mandatory); 3. Computer and Information Systems (Mandatory); 4. Content Development; 5. Online Facilitation Services; and 6. Data Analysis and Reporting. <ul style="list-style-type: none"> • All three (3) consultation projects <u>must</u> include the use of at least four (4) of the Service Categories listed above. Expert and Strategic Advice, Project Management, and Computer and Information Systems are mandatory and <u>must be</u> included and detailed in each proposed sample; and • Over the three (3) consultation projects, Offerors must demonstrate their experience in all six (6) services categories listed above. | | |
| Comments: | | |
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| | | |
| | | |

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

| Evaluation Criteria | Met | Not met |
|---|-----|---------|
| MB.2 OFFEROR'S CHOICE – STREAM SELECTION | | |
| The Offeror must complete Appendix "3" - Offeror's Choice – Stream Selection in order to identify the Stream(s) for which they are providing the required services. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

| Evaluation Criteria | Met | Not met |
|--|-----|---------|
| MB.3 INTERNET SITE | | |
| Offerors must have an Internet site that is accessible by Client Departments and Agencies. The purpose of this Internet site is to provide information on the services available and the Offeror's qualifications to provide those services. Therefore, in order to meet this mandatory requirement, the Offeror must have an Internet site and provide the active Internet address. | | |
| Comments: | | |
| | | |
| | | |
| | | |
| | | |

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

1.1.2 RATED TECHNICAL CRITERIA

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. To be considered compliant, bidders must obtain the required minimum of 70 percent of the points for each rated criteria. An overall passing mark of 336 points on a scale of 540 points is required under the requirement "Experience of the Firm" and the bidders must obtain the required minimum of 84 points out of a possible 120 points under the requirement "Understanding and Approach" and also the bidders must obtain the required minimum of 140 points out of a possible 200 points under the requirement "Compliance with Government of Canada Web Standards". Proposals scoring less will not be given further consideration.

NOTE: Percentage factors will be the basis used to allocate points for all rated requirements. The number of points will be calculated depending on the total value given for each criterion. We cannot deviate from the established scoring grid. For example, we could not give a score of 0.75 (75%). We would have to choose between a 0.7 or a 0.8 (70% or 80%).

INSTRUCTIONS TO EVALUATORS

PLEASE READ THE FOLLOWING CAREFULLY AND IN ITS ENTIRETY PRIOR TO COMMENCING THE EVALUATION OF THE RATED REQUIREMENTS.

4. The following scoring grid will be used for the evaluation of the rated criteria.
5. ONLY the Percentage Factors indicated in the table are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available Percentage Factors: 1, 0.8, 0.7, 0.5, and 0. Factors such as 0.65, 0.85, etc. MUST NOT be used.
6. The "Points" and "Total Points" boxes in the grids will be calculated based on the Percentage Factor(s) assigned. Evaluators MUST NOT select a number for "Points" which does not correspond to a Percentage Factor. For example, 3/10 is not an acceptable score as 0.3 is not an available.

RB.1 EXPERIENCE OF THE FIRM
(Maximum: 540 points - Minimum: 336 points)

The Consultation Projects will be evaluated on the following rated criteria:

RB.1.1 Expert and Strategic Advice (Mandatory) (50 points per project submitted)

At a minimum we are looking for the following criteria:

- 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 concerning how to reach underrepresented groups and/or hard to reach populations, regional context and influence and/or adherence to policies, standards and procedures; and
- Explained the accommodation and participation strategy.

| Expert and Strategic Advice – Up to a maximum of 150 points. | | | |
|--|--------|-------------------|--------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 50 |
| Percentage factors utilized for the evaluation: | | | |
| <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on expert and strategic advice in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on expert and strategic advice in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on expert and strategic advice in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 150 |

RB.1.1 Project Management (Mandatory) (50 points per project submitted)

At a minimum we are looking for the following criteria:

- 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 that the project was delivered within constraints, on-time and within budget; and
- Described the challenges and solution in the aspect of change management and control procedures.

| Project Management – Up to a maximum of 150 points. | | | |
|---|--------|-------------------|--------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 50 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on project management in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on project management in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on project management in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 150 |

RB.1.1 Computer and Information Systems (Mandatory) (50 points per project submitted)

At a minimum we are looking for the following criteria:

- 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); and
- Described how the pilot test was conducted.

| Computer and Information Systems – Up to a maximum of 150 points. | | | |
|---|--------|-------------------|--------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 50 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 50 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7):</u> This is the established minimum. Acceptable information was provided on computer and information systems in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information was provided on computer and information systems in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information was provided on computer and information systems in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 150 |

RB.1.1 Content Development (Optional) (Up to 10 points per project submitted)

- Demonstrated experience in developing a variety of materials/tools to support the consultation;
- Identified the extent to which research and analysis were conducted and influenced 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; and
- Described the approach to translation services for online consultations.

| Content Development – Up to a maximum of 30 points. | | | |
|--|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 10 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on content development in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on content development in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on content development in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 30 |

RB.1.1 Online Facilitation Services (Optional) (10 points per project submitted)

At a minimum we are looking for the following criteria:

- Demonstrated the facilitator's role during the consultation;
- Demonstrated how the rules of engagement were applied;
- Executed facilitation services in French and/or English;
- Demonstrated experience in the use of a variety of techniques to generate online dialogue; and
- Described the challenges and solutions encountered during the online facilitation services: such as dealing with emerging issues and unexpected or unforeseen events.

| Online Facilitation Services – Up to a maximum of 30 points. | | | |
|---|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 10 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on online facilitation services in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on online facilitation services in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on online facilitation services in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 30 |

RB.1.1 Data Analysis and Reporting (Optional) (10 points per project submitted)

At a minimum we are looking for the following criteria:

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

| Data Analysis and Reporting – Up to a maximum of 30 points. | | | |
|--|--------|-------------------|-------------------|
| Assessment of Criteria | Sample | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 1 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 2 | | / 10 |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | 3 | | / 10 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information was provided on data analysis and reporting in order to meet the project's objectives. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information was provided on data analysis and reporting in order to meet the project's objectives. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information was provided on data analysis and reporting in order to meet the project's objectives. All elements were addressed and well defined.</p> | | | |
| Comments: | | | Total Points / 30 |

Total points allocated for the Consultation Project Sample 1: _____ / 180 points
 Total points allocated for the Consultation Project Sample 2: _____ / 180 points
 Total points allocated for the Consultation Project Sample 3: _____ / 180 points

Total points allocated for the Rated Criteria RB.1: _____ / 540 points

**RB.2 UNDERSTANDING AND APPROACH
 (Maximum: 120 points - Minimum: 84 points)**

The Understanding and Approach will be evaluated on the following rated criteria:

RB.2.1 Understanding of Government Requirements (30 points)

At a minimum we are looking for the following criteria:

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 A3.2, Specifications and Standards.

| Understanding of Government Requirements – Up to a maximum of 30 points. | | |
|---|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7):</u> This is the established minimum. Acceptable information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information provided that demonstrates processes and approaches in ensuring that services are delivered in accordance with Government of Canada's acts, codes, regulations and policies. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RB.2.2 Opportunities and Challenges (30 points)

At a minimum we are looking for the following criteria:

Describes the opportunities and challenges in providing online stakeholder and citizen engagement and consultation activities adhering to Government requirements including Government acts, codes, regulations and policies.

| Opportunities and Challenges – Up to a maximum of 30 points. | | |
|---|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present. <u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum. <u>Acceptable (0.7)</u>: This is the established minimum. Acceptable opportunities and challenges are identified and described. A few elements might have been better detailed but there is no real impact of the assessment. <u>Good (0.8)</u>: Good opportunities and challenges are identified and described. Most or all elements were addressed and well defined. <u>Very Good (1)</u>: Complete and clear opportunities and challenges are identified and described. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RB.2.3 Quality Assurance (30 points)

At a minimum we are looking for the following criteria:

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 Offeror's approach to quality assurance.

| Quality Assurance – Up to a maximum of 30 points. | | |
|--|-------------------|-------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8)</u>: Good information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1)</u>: Complete and clear information is provided in order to assess the quality assurance systems and processes that are in place to manage resources, projects and timelines. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

RB.2.4 Information Security Management (30 points)

At a minimum we are looking for the following criteria:

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 A3.2, Specifications and Standards.

| Information Security Management – Up to a maximum of 30 points. | | |
|--|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 30 |
| <p>Percentage factors utilized for the evaluation:</p> <p><u>Not acceptable (0):</u> The information provided was unsuitable or insufficient or not present.</p> <p><u>Limited (0.5):</u> Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum.</p> <p><u>Acceptable (0.7): This is the established minimum.</u> Acceptable information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. A few elements might have been better detailed but there is no real impact of the assessment.</p> <p><u>Good (0.8):</u> Good information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. Most or all elements were addressed and well defined.</p> <p><u>Very Good (1):</u> Complete and clear information is provided about general security measures, data protection, data cleansing practices and internal security measures. The handling of sensitive information is addressed. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 30 |

Total points allocated for the Rated Criteria RB.2: _____ / 120 points

**RB.3 COMPLIANCE WITH GOVERNEMENT OF CANADA WEB STANDARDS
 (Maximum: 200 points - Minimum: 140 points)**

The Compliance with Government of Canada Web Standards will be evaluated on the following rated criteria:

RB.3.1 Process and Methodologies (140 points)

At a minimum we are looking for the following criteria:

Explains the processes and methodologies that would be used to develop test and execute the Online consultations, including how to ensure the tools and/or platforms are compliant with all Government Web Standards.

| Process and Methodologies – Up to a maximum of 140 points. | | |
|--|-------------------|-----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 140 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present. <u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum. <u>Acceptable (0.7)</u>: This is the established minimum. Acceptable information is provided that explains process and methodologies that would be used to develop, to test and to execute the Online consultations and to also ensure the tools and/or platforms are compliant. A few elements might have been better detailed but there is no real impact of the assessment. <u>Good (0.8)</u>: Good information is provided that explains process and methodologies that would be used to develop, to test and to execute the Online consultations and to also ensure the tools and/or platforms are compliant. Most or all elements were addressed and well defined. <u>Very Good (1)</u>: Complete and clear information is provided that explains process and methodologies that would be used to develop, to test and to execute the Online consultations and to also ensure the tools and/or platforms are compliant. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 140 |

RB.3.2 Proposed Solutions (60 points)

At a minimum we are looking for the following criteria:

Proposes solutions to overcome the potential technical challenges related to Government Web Standards.

| Proposed Solutions – Up to a maximum of 60 points. | | |
|--|-------------------|----------------------|
| Assessment of Criteria | Percentage Factor | Points |
| Criterion for an established minimum acceptable response (Percentage factor of 0.7): | | / 60 |
| <p><i>Percentage factors utilized for the evaluation:</i></p> <p><u>Not acceptable (0)</u>: The information provided was unsuitable or insufficient or not present. <u>Limited (0.5)</u>: Criterion addressed, but not enough information provided and/or not acceptable and/or to basic. Less than established minimum. <u>Acceptable (0.7)</u>: This is the established minimum. Acceptable solutions are described to demonstrate how to overcome the potential Government Web Standards technical challenges. A few elements might have been better detailed but there is no real impact of the assessment. <u>Good (0.8)</u>: Good solutions are described to demonstrate how to overcome the potential Government Web Standards technical challenges. Most or all elements were addressed and well defined. <u>Very Good (1)</u>: Complete and clear solutions are described to demonstrate how to overcome the potential Government Web Standards technical challenges. All elements were addressed and well defined.</p> | | |
| Comments: | | Total Points / 60 |

Total points allocated for the Rated Criteria RB.3: _____ / 200 points

APPENDIX “ 1 ”
SAMPLE TEMPLATE STREAM A
“ PROPOSED PROJECT SUMMARY SHEET “

In order to ensure that the evaluation team gets the information needed to evaluate the Consultation Projects, please ensure that the following information is provided on a “per project” basis. These are to be combined with the complete details provided under the Statement of Work.

The Offeror is to use the headings and subheadings provided below: use plain language; provide facts and sources.

| | |
|----------------------------------|--|
| Background Information: | Name and contact information for company/department/agency representative that managed the project. Project name. Project start and end date. |
| Expert and Strategic Advice: | 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. |
| Project Management: | Describe how project management was carried out, including the provision of a work plan and schedule detailing the timelines of deliverables and services, reporting on progress, challenges and solutions, managing overall team, tasks, deadlines and budget. |
| 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. |
| In-Person 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 |

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| | <p>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,</p> <p>* 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.</p> |
| Data Analysis and Reporting: | <p>Describe how the data analysis and report development was carried out, including a description of the analysis methodology used, and types of reports prepared.</p> |
| Understanding and Approach: | <p>Describe how the Offeror understands GC requirements, processes and approaches to ensure that services and deliverables will be provided in accordance with relevant Government of Canada Acts, codes, regulations and policies. This should include opportunities and challenges in providing In-person stakeholder and citizen engagement and consultation activities adhering to GC requirements, including GC Acts, codes, regulations and policies.</p> <p>Describe 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. This should also include processes in place to manage general and information security.</p> |

**APPENDIX “ 2 ”
 SAMPLE TEMPLATE STREAM B
 “ PROPOSED PROJECT SUMMARY SHEET “**

In order to ensure that the evaluation team gets the information needed to evaluate the Consultation Projects, please ensure that the following information is provided on a “per project” basis. These are to be combined with the complete details provided under the Statement of Work.

The Offeror is to use the headings and subheadings provided below: use plain language; provide facts and sources.

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| Background Information: | Name and contact information for company/department/agency representative that managed the project. Project name. Project start and end date. |
| Expert and Strategic Advice: | 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, adherence to policies, standards. Describe challenges and solutions encountered during strategic thinking. |
| Project Management: | Describe how project management was carried out, including the provision of a work plan 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. |
| Computer and Information Systems: | 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. 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. |
| 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 |

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| | included in the development of all Online activities and solutions. |
| Online Facilitation Services: | 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. |
| Data Analysis and Report Development Services: | Describe how the data analysis and report development was carried out, including a description of the analysis methodology used, and types of reports prepared. |
| Understanding and Approach: | <p>Describe how the Offeror understands GC requirements, processes and approaches to ensure that services and deliverables will be provided in accordance with relevant Government of Canada Acts, codes, regulations and policies. This should include opportunities and challenges in providing Online stakeholder and citizen engagement and consultation activities adhering to GC requirements, including GC Acts, codes, regulations and policies.</p> <p>Describe the systems and processes that are in place to manage Online consultation projects that may require the use of the same resources, how resources are assigned to projects, how timelines are managed, and the Offeror's approach to quality assurance. This should also include processes in place to manage general and information security.</p> |
| Compliance with Government of Canada Web Standards: | Describe the processes and methodologies that would be used to develop test and execute the Online consultations, including how to ensure the tools and/or platforms are compliant with all GC Web Standards. This should also include proposed solutions to overcome the potential technical challenges related to GC Web Standards. |

**APPENDIX “ 3 ”
OFFEROR’S CHOICE – STREAM SELECTION**

INSTRUCTIONS:

Identifying a stream

Offerors must clearly indicate the stream for which they wish to be considered (any combination of Stream A, Stream B and/or Stream C). If you wish to apply to both Stream A and Stream B, please submit a bid to Stream C.

Single firms

If you are a single firm (meaning no joint ventures) wishing to qualify for all three streams, submit one proposal with six project summaries (three following the requirements of Stream A and three following the requirements of Stream B). If a firm bids for Stream C and only qualifies in one of the service categories, the firm will be eligible for a Standing Offer in that stream (e.g. If you obtain a passing score in Stream A and not Stream B, you will be eligible for a Standing Offer in Stream A only).

Joint ventures*

If a bid for any of the streams is submitted as a joint venture, the proposal must clearly indicate which firm(s) will be providing services for each Stream. If any partners in a joint venture wish to be independently considered for any of the streams, a separate bid must be submitted under Stream A or Stream B.

*Association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred to as a consortium, to bid together on a requirement.

OFFEROR’S CHOICE:

STREAM A: Services for In-person Stakeholder and Citizen Engagement and Consultation Activities

Single Firm : _____

Joint Venture: _____

STREAM B: Services for Online Stakeholder and Citizen Engagement and Consultation Activities

Single Firm : _____

Joint Venture: _____

STREAM C: Services for In-person and Online Stakeholder and Citizen Engagement and Consultation Activities

Single Firm : _____

Joint Venture: _____

As mentioned above, Offerors must clearly indicate the stream for which they wish to be considered (any combination of Stream A, Stream B and/or Stream C). If you wish to apply for both Stream A and Stream B, please only submit a bid for Stream C.

OFFEROR'S CHOICE EXAMPLE:

| | Offer 1 | | Offer 2 | | Offer 3 | | Offer 4 | |
|--|-------------|---------------|-------------|---------------|-------------|---------------|-------------|---------------|
| | Single Firm | Joint Venture |
| STREAM A: Services for In-person | | | X | | | | | X |
| STREAM B: Services for Online | | | | X | | | | |
| STREAM C: Services for In-person and Online | X | | | | | X | | |

- Offer 1 will be considered for Stream A, Stream B and Stream C, as a Single Firm. This firm only needs to provide 1 proposal and follow the Stream C directives. If this firm is successful in all three Streams, they will be awarded a Standing Offer under Stream A, Stream B and Stream C.
- Offer 2 will be considered for Stream A as a Single Firm and for Stream B in a Joint Venture. In this scenario, the firm will need to provide 2 proposals, one for Stream A as a Single Firm and a second one for Steam B in conjunction with the Joint Venture partnership. If these firms are successful, a Standing Offer for the Single Firm will be awarded under Stream A and a Standing Offer as a Joint Venture for Stream B. Under this scenario, these firms would not be considered for Stream C.
- Offer 3 will be considered for Stream A, Stream B and Stream C, as a Joint Venture. This Joint Venture only needs to provide 1 proposal and follow the Stream C directives. If this Joint Venture is successful in all three Streams, they will be awarded a Standing Offer under Stream A, Stream B and Stream C.
- Offer 4 will be considered for Stream A as a Joint Venture only. If this Joint Venture partnership is successful, they will be awarded a Standing Offer under Stream A. This Joint Venture only needs to provide 1 proposal and follow the Stream A directives.