



Return Bids to :

Retourner Les Soumissions à :

Natural Resources Canada
 Bid Receiving Unit - Mailroom
 588 rue Booth Street
 Ottawa, Ontario
 K1A 0Y7
 Attention: **Valerie Holmes**

**Request for Standing Offer
 Demande d'offre à commandes**

Canada, as represented by the Minister of Natural Resources Canada, hereby requests a Standing Offer on behalf of the client identified herein.

Le Canada, représenté par le ministre des Ressources naturelles Canada, autorise par la présente, une offre à commandes au nom de client identifié ci-après

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

Comments - Commentaires

This document contains no security requirement
 Ce document ne comprend pas des dispositions en matière de sécurité

Issuing Office - Bureau de distribution

Natural Resources Canada
 Finance and Procurement Branch
 580 Booth Street, 5th Floor
 Ottawa, Ontario
 K1A 0E4
 Attention: **Valerie Holmes**

Title - Sujet Provision of Training Services for NRCan's EnerGuide Rating System and related Initiatives	
Solicitation No. - No de l'invitation NRCan-5000009512B	Date 16 June 2014
Client Reference No. - N° de reference du client 5000009512	
Requisition Reference No. - N° de la demande 096361	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM EDT on - le 25 July 2014	
Address Enquiries to: - Adresse toutes questions à: Valerie Holmes	Buyer ID - Id de l'acheteur AB4
Telephone No. - No de telephone (613) 943-3580	Fax No. - No. de Fax (613) 947-5477
Security - Sécurité There is no security requirement associated with this requirement.	
<i>If marked "X" please see the box to the left / S'il ya un "X" ici, s.v.p. voir la boîte à la gauche</i> <input checked="" type="checkbox"/> Acknowledgement copy required / Accusé de réception requis	
Destination - of Goods, Services and Construction: Destination - des biens, services et construction: Natural Resources Canada / Ressources naturelles Canada 580 rue Booth Street Ottawa, Ontario K1A 0E4	
Security - Sécurité This Request for Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No.:- No. de téléphone: Facsimile No.:- No. 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 _____



NOTE TO BIDDERS: This Request for Standing Offer (hereinafter referred to as an “RFSO”) is being re-issued as too much time has lapsed since the closing date of the original request, due to administrative issues. For bidders who have already submitted a response to the original request, there is no need to re-submit your technical bid; however, you must contact the Contracting Authority, prior to the closing date and time of this RFSO, to either confirm the rates will be honoured in your original financial proposal OR submit a new financial proposal.

For new Bidders, you will need to provide a complete proposal which will include a Technical Bid, Financial Bid and Certifications which must be submitted as per the Submission of Offers section of this RFSO.



TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION 6

1. Introduction..... 6

2. Summary..... 6

3. Security Requirement 8

4. Debriefings..... 8

PART 2 - OFFEROR INSTRUCTIONS 9

1. Standard Instructions, Clauses and Conditions..... 9

1.1 The Following SACC Manual Clauses Shall Apply 10

2. Submission of Offers 10

3. Enquiries - Request for Standing Offers..... 10

4. Applicable Laws 10

5. Basis for Canada’s Ownership of Intellectual Property..... 10

PART 3 - OFFER PREPARATION INSTRUCTIONS 11

1. Offer Preparation Instructions 11

ATTACHMENT 1 to PART 3 - PRICING SCHEDULE..... 12

ATTACHMENT 2 TO PART 3 13

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION 14

1. Evaluation Procedures and Basis of Selection..... 14

1.1. Technical Evaluation..... 15

1.2. Financial Evaluation..... 15

ATTACHMENT 1 to PART 4 - TECHNICAL AND FINANCIAL CRITERIA..... 16

PART A - GENERAL QUALIFICATIONS (GQ) - CATEGORIES 1, 2, 3, 4 17

A.1 Mandatory Technical Criteria (GQ)..... 17

A.2 Point Rated Technical Criteria..... 19

PART B - CATEGORY 2 - ENERTGUIDE RATING SYSTEM 21

B.1 Mandatory Technical Criteria (Specialization A and B)..... 21

B.2 Point Rated Technical Criteria:..... 23

B.3 Point Rated Technical Criteria:..... 24

PART C - CATEGORY 3 - R-2000 25

C.1 Mandatory Technical Criteria..... 25

C.2 Point Rated Technical Criteria:..... 26

PART D - CATEGORY 4 - Multi-Unit Residential and Mixed-Use Buildings 27

D.1 Mandatory Technical Criteria..... 27

D.2 Point Rated Technical Criteria:..... 28

PART E BONUS POINTS 30

PART 5 - CERTIFICATIONS 31

1. Certifications Required with the Offer..... 31

1.1 Federal Contractors Program - Certification 31

1.2 Former Public Servant Certification 32

1.3 Status and Availability of Resources 33

1.4 Education and Experience 33

1.5 Contractual Capacity and Joint Venture Contractual Capacity 34

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS..... 35

1. Security Requirement 35

2. Insurance Requirements..... 35

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES 36

A. STANDING OFFER..... 36

1. Offer..... 36

2. Security Requirement 36

3. Standard Clauses and Conditions..... 36

3.1 General Conditions 36

3.2 Standing Offers Reporting 36

4. Term of Standing Offer 37



- 4.1 Period of the Standing Offer 37
- 4.2 Extension of Standing Offer 37
- 5. Authorities..... 37
 - 5.1 Standing Offer Authority 37
 - 5.2 Project Authority 37
 - 5.3 Offeror's Representative 37
- 6. Identified Users..... 38
- 7. Work Allocation and Call-up Procedures 38
- 8. Call-up Instrument 38
- 9. Limitation of Call-ups 38
- 10. Priority of Documents 38
- 11. Certifications..... 39
 - 11.1 Compliance 39
 - 11.2 SACC Manual Clauses..... 39
- 12. Applicable Laws..... 39
- B. RESULTING CONTRACT CLAUSES..... 39**
 - 1. Statement of Work..... 39
 - 2. Standard Clauses and Conditions..... 39
 - 2.1 General Conditions 39
 - 2.2 Supplemental General Conditions 39
 - 2.3 SACC Manual Clauses..... 41
 - 3. Term of Contract 41
 - 3.1 Delivery Date..... 41
 - 3.2 Period of the Contract..... 42
 - 4. Payment..... 42
 - 4.1 Basis of Payment 42
 - 4.2 Limitation of Price 42
 - 4.3 Method of Payment 42
 - 5. Invoicing Instructions..... 42
 - 5.1 Supplemental Invoicing Instructions 42
 - 6. Insurance 43
- ANNEX "A" - STATEMENT OF WORK 44**
 - SW1 Title..... 44
 - SW2 Definitions of Key Terms:..... 44
 - SW3 Background..... 47
 - SW4 Bidder Requirements 47
 - SW5 Scope..... 48
 - SW5.1 Residential Energy Efficiency Initiatives and Workshop Descriptions 50
 - SW6 Tasks..... 51
 - SW6.1 In-class workshops..... 51
 - SW6.2 Mentoring option 53
 - SW6.3 Other Related Training Services 55
 - SW7 Equipment 56
 - SW7.1 For the Delivery of Workshops 56
 - SW7.2 For On-Site Training and Supervision 56
 - SW7.3 Additional Materials (as appropriate)..... 57
 - SW8 Role of NRCan..... 58
 - SW9 Intellectual Property..... 59
 - SW10 Language 59
 - SW11 Travel 59
 - SW12 Deliverables..... 59
 - SW12.1 Pre-Workshop Deliverables 59
 - SW12.2 Post-Workshop Deliverables 59
 - SW12.3 Deliverables for Other Related Training Services..... 60
 - SW13 Other Obligations..... 60



SW13.1	Code of Ethics.....	60
SW13.2	Constraints	60
SW13.3	Exclusion and Indemnification	60
SW13.4	Orientation Session	61
SW13.5	Update Sessions.....	61
SW13.6	Equipment and Software Maintenance	61
SW13.7	Record Keeping	61
SW13.8	Maintenance of Training Material	61
SW13.9	NRCan-approved Instructor List.....	61
Attachment 1 to Annex "A": Workshop Chart		62
Attachment 2 to Annex "A": Practicum Evaluation.....		67
Attachment 3 to Annex "A": Workshop Categories and Corresponding Proposal Evaluation Approach		69
ANNEX "B" - BASIS OF PAYMENT		1
1.	Basis of Payment.....	1
1.1	Professional Fees	1
1.2	Travel and Living Expenses	2



PART 1 - GENERAL INFORMATION

1. Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment and any other annexes.

2. Summary

The Department of Natural Resources Canada (NRCan) is looking to establish a National Individual Standing Offer (NISO) for the provision of Training Services for NRCan's EnerGuide Rating System and related initiatives.

NRCan's Office of Energy Efficiency (OEE) administers several voluntary, residential energy efficiency initiatives. The primary objective of these initiatives is to improve the energy efficiency of new and existing low-rise housing in Canada. While the details and procedures may vary, each initiative uses the EnerGuide Rating System (ERS) to measure the level of energy efficiency of a home.

To support these initiatives, NRCan provides training and training materials to service organizations (SO) and other stakeholders across Canada on topics such as the administrative and technical procedures related to its residential energy efficiency initiatives and the use of HOT2000 or recognized modeling tools.

The request for standing offer (RFSO) will result in:

- **Standing Offers (SO):** Multiple Standing Offers may be awarded for the categories listed below. The Standing Offers may be used by NRCan to teach and evaluate program participants for all housing initiatives.

The Standing Offer shall be valid for two years with the option to extend the period of the Standing Offer for up to three (3) additional twelve (12) month periods.



- **Qualified List:** The qualified list will be shared with Service Organizations across Canada. The Service Organizations may use this list to acquire the services of qualified instructors to teach and evaluate train-the-trainer workshop participants for all housing initiatives. This list will only include the names of the suppliers and their proposed resources without divulging any information regarding their financial proposals. Service Organizations (third party) will follow their own procurement/contracting procedures and the Terms and Conditions of this RFSO will not apply.

The Qualified List may be refreshed as needed to allow for the qualification of new instructors.

Multiple Standing Offers (SO's) may be awarded for the following categories:

- **Category 1:** Building Science and Energy-Efficient Housing
- **Category 2:** EnerGuide Rating System
 - **Specialization A** - EnerGuide Rating System for **existing homes**
 - **Specialization B** - EnerGuide Rating System for **new homes** and ENERGY STAR for New Homes
- **Category 3:** R-2000
- **Category 4:** Multi-Unit Residential Buildings (MURB) and Mixed-Use Buildings (MUB)

For work that will be conducted in the Northern Territories covered under the Comprehensive Land Claim Agreements (CLCA): the procurement is reserved for beneficiaries of the following Comprehensive Land Claims Agreement(s):

1. **Quebec:**
 - a. James Bay and Northern Quebec Agreement (JBNQA) (1975), amended to include the Northeastern Quebec Agreement (1978)
2. **Yukon, Northwest Territories, and Nunavut:**
 - a. The Inuvialuit Final Agreement (1984)
 - b. Gwich'in Comprehensive Land Claim Agreement (1992)
 - c. Nunavut Land Claims Agreement (1993)
 - d. Umbrella Final Agreement - Council for Yukon Indians (1993):
 - (i) First Nation of Nacho Nyak Dun Final Agreement (1995)
 - (ii) Champagne and Aishihik First Nations Final Agreement (1995)
 - (iii) Teslin Tlingit Council Final Agreement (1995)
 - (iv) Vuntut Gwich'in First Nation Final Agreement (1995)
 - (v) Selkirk First Nation Final Agreement (1997)
 - (vi) Little Salmon/Carmacks First Nation Final Agreement (1997)
 - (vii) Tr'ondëk Hwëch'in Final Agreement (1998)
 - (viii) Ta'an Kwach'an Council Final Agreement (2002)
 - (ix) Kluane First Nation Final Agreement (2004)
 - (x) Kwanlin Dun First Nation Final Agreement (2005)
 - (xi) Carcross/Tagish First Nation Final Agreement (2005)
 - e. Sahtu Dene and Metis Comprehensive Land Claim Agreement (1994)
 - f. Tlicho Land Claims Agreement (2005)
 - g. Nunavik Inuit Land Claims Agreement (2008)



3. Newfoundland and Labrador

- a. Labrador Inuit Land Claims Agreement (2005)

For work that will be conducted in all other regions excluding areas covered under CLCA agreements: the requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

3. Security Requirement

There are no security considerations associated with this requirement.

4. Debriefings

After issuance of a standing offer, Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.



PART 2 - OFFEROR INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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

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

The **2006 (2014-01-01) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements**, are incorporated by reference into and form part of the RFSO.

Subsection 4 and 5 of Section 01 - Code of Conduct and Certifications - Offer of 2006 (2014-03-01) referenced above is deleted in its entirety.

Subsection 5.2 of 2006 (2014-03-01), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: (d) send its offer only to PWGSC Bid Receiving Unit specified on page 1 of the RFSO or to the address specified in the RFSO.

Insert: (d) send the offer according to the instructions specified in the RFSO

Subsection 5.4 of 2006 (2014-03-01), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred and twenty days (120) days

Subsection 8.1 of 2006 (2014-03-01), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: "819-997-9776"

Insert: "613-995-2920"

Subsection 20.2 of 2006 (2014-03-01), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: in its entirety

In the complete text content (except subsection 3) of 2006 (2014-03-01), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements is amended as follows:

Delete: "Public Works and Government Services Canada"

Insert: Natural Resources Canada

Delete: "PWGSC"

Insert: "NRCan"



1.1 The Following SACC Manual Clauses Shall Apply

M0019T (2007-05-25), Firm Price and/or Rates
M3020T (2010-01-11), Status and Availability of Resources
M3021T (2012-07-16), Education and Experience
M7035T (2013-07-10), List of Proposed Subcontractors

2. Submission of Offers

Offers must be submitted only to Natural Resources Canada (NRCan) Bid Receiving Unit by the date, time and place indicated on page 1 of the Request for Standing Offers.

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile to NRCan will not be accepted.

3. Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than **five (5)** calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

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

4. Applicable Laws

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

5. Basis for Canada's Ownership of Intellectual Property

NRCan has determined that any intellectual property arising from the performance of the Work under the Contract will vest in Canada, on the following grounds:

"to generate knowledge and information for public dissemination"



PART 3 - OFFER PREPARATION INSTRUCTIONS

1. Offer Preparation Instructions

Canada requests that offerors provide their offer as follows:

- Section I: Technical Offer - 4 soft copies (1 original with Technical Offer, Financial Offer, Certifications);
- Section II: Financial Offer - 1 soft copy (included in the 1 original with the Technical Offer and Certifications);
- Section III: Certifications - 1 soft copy (including in the 1 original with the Technical Offer and Financial Offer).

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

Section I: Technical Offer

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

Section II: Financial Offer

- a. Offerors must submit their financial offer in Canadian funds and in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.
- b. Offerors must submit their prices and rates FOB destination; Canadian customs duties and excise taxes included, as applicable; and GST or HST is extra, if applicable
- c. When preparing their financial offer, Offerors should review the **Basis of Payment in Annex "B"** and clause 1.2, Financial Evaluation, of Part 4.
- d. The rates and prices included in the pricing schedule detailed in Attachment 1 to Part 3 **include** the total estimated cost of **all travel and living expenses** that may be incurred for Work (described in Part 6, Resulting Contract Clauses of the offer solicitation) as well as for Work required to be performed within the locations identified in **Column 3, Offeror Geographic Locations and Language Capabilities Table, Attachment 2 to part 3.**
- e. Offerors should include the following information in their offer:
 - Their legal name;
 - Their Procurement Business Number (PBN); and
 - The name of the contact person (including this person's mailing address, phone and facsimile numbers and e-mail address) authorized by the Offeror to enter into communications with Canada with regards to:
 - a. their offer; and
 - b. any contract that may result from their offer.
- f. **SACC Clauses**
C3011T(2010-01-11), Exchange Rate Fluctuation

Section III: Certifications

Offerors must submit the certifications required under Part 5.



ATTACHMENT 1 TO PART 3 - PRICING SCHEDULE

The Offeror should complete this pricing schedule and include it in its financial offer. As a minimum, the Offeror must respond to this pricing schedule by inserting its financial offer for each of the periods specified below (firm all-inclusive daily rate (in Cdn \$) for each of the proposed resource(s)).

The rates specified below, when quoted by the Offeror, must include the total estimated cost of all travel and living expenses that may need to be incurred for:

- a) the Work described in **Annex "A", Part 7, Resulting Contract Clauses** of this offer solicitation; and
- b) travel to the locations identified in **Column 3 of Attachment 2 to Part 3 - Offeror Geographic Locations and Language Capabilities Tables**.

For evaluation purposes:

- **Single resource:** Column F (total) will be used
- **Multiple resources:** Column F (total) will be used to calculate the average; the average value will be used for evaluation purposes.

Professional fees - Firm, all inclusive daily rates

Category: _____

Name of Resource (s)	Year 1 (A)	Year 2 (B)	Option Year 1 (C)	Option Year 2 (D)	Option Year 3 (E)	Total (Evaluated Price) (F =A+B+C+D+E)



ATTACHMENT 2 TO PART 3

Offeror Geographic Locations and Language Capabilities Table:

Name of Proposed Resource (s)	Identify Language(s) in which the proposed resource can provide the services:	List all Canadian City (ies) where the proposed resources would be prepared to work without being reimbursed for Travel & Living expense.

Check the category(ies) and region(s) of delivery for which an offer is being submitted:

<input type="checkbox"/>	Category 1 - Building Science and Energy-Efficient Housing
<input type="checkbox"/>	Category 2 - EnerGuide Rating System
<input type="checkbox"/>	Specialization A - EnerGuide Rating System for existing homes
<input type="checkbox"/>	Specialization B - EnerGuide Rating System for new homes and ENERGY STAR for New Homes
<input type="checkbox"/>	Category 3 - R-2000
<input type="checkbox"/>	Category 4 - Multi-Unit Residential and Mixed-Use Buildings

Region	Description
<input type="checkbox"/> British Columbia	The entire province of British Columbia
<input type="checkbox"/> Prairies	This region includes the provinces of Alberta, Saskatchewan and Manitoba
<input type="checkbox"/> Ontario	This Region includes the province of Ontario with the exception of NCR
<input type="checkbox"/> National Capital Region (NCR)	The NCR is defined in the National Capital Act, R.S.C. 1985, c. N-4, S.2. The National Capital Act is available on the Justice Website: Department of Justice;
<input type="checkbox"/> Quebec	This region includes the province of Quebec excluding areas defined under NCR
<input type="checkbox"/> Atlantic Canada	This region includes the provinces of New Brunswick, Prince Edward Island, Nova Scotia, Newfoundland and Labrador
<input type="checkbox"/> Northern Canada (Territories)	This region includes Yukon, Northwest Territories, Nunavut



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures and Basis of Selection

- (a) **Conduct of Evaluation in Phases:** There are several phases in the evaluation methodology, which are described below. Notwithstanding that the evaluation and selection methodology will be conducted in phases, the fact that Canada has proceeded to a later phase will not be deemed to mean that Canada has conclusively determined that the Offeror has successfully passed all the previous phases. Canada reserves the right to conduct phases of the evaluation in parallel or concurrently. Clarifications may be sent to Offerors at any time during the evaluation process.
- (b) **Phase 1 - Offer verification:** NRCan will verify that an Offer includes all applicable certifications and other documentation requested under the solicitation and that such information is complete. Should any information be missing, NRCan may request the information from the Offeror.
- (c) **Phase 2 - Confirmation of Compliance to Mandatory and Point Rated Technical Requirements:** Each Offer will be reviewed for compliance with the mandatory and point rated technical criteria set out below and any other mandatory requirements contained in this solicitation.
- (d) **Phase 3 - Written Test (Technical Examination) - New Bidders Only:** The Offeror's proposed resources must participate in and pass the written test related to the category for which a proposal is submitted.
- (e) **Phase 4 - Evaluation of Financial Offer:** Each Offer will be reviewed for compliance with the financial requirements identified in the pricing schedule, Attachment 1 and 2 to Part 3 of this solicitation for each equipment category for each period (initial SO period and the option periods).
- (f) **Phase 5 - Offeror Selection:**
 - i) The formula stated below will be used to rank Offerors in each given region for the categories for which an offer was submitted.

Highest Combined Rating of Technical Merit (70%) and Price (30%)

Example of 70% Technical Merit and 30% Price Determination			
	Offeror 1	Offeror 2	Offeror 3
Technical Points Achieved by Bidder	88	82	76
Price Quoted by Bidder	\$85,000	\$80,000	\$75,000
CALCULATIONS			
	Technical Points Achieved	Rated Price Points Achieved	Total Points Achieved
Bidder 1	$\frac{88}{88} \times 70 = 70.00$	$\frac{75}{85} \times 30 = 26.47$	96.47
Bidder 2	$\frac{82}{88} \times 70 = 65.23$	$\frac{75}{80} \times 30 = 28.13$	93.36
Bidder 3	$\frac{76}{88} \times 70 = 60.46$	$\frac{75}{75} \times 30 = 30.0$	90.46



* Represents the highest technical score
** Represents the lowest priced proposal

Assumption: Three responsive (compliant) offers have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest bid price receive full rated percentage and other proposals are pro-rated accordingly.

Ranking: Based on the total points achieved the offers will be ranked:

1. Offeror 1
2. Offeror 2
3. Offeror 3

- (i) Offerors who have not satisfied any Conditions of this RFSO in the time allotted by Canada will be deemed non-compliant and their offers will be disqualified.
- (ii) Offerors should note that the award of all Standing Offers is subject to Canada's internal approvals process. Notwithstanding that an Offeror may have been recommended for award of a Standing Offer, award of any Standing Offer will be contingent upon internal approval in accordance with Canada's policies. If such approval is not given, some or all Standing Offers will not be awarded.
- (iii) Up to ten (15) Offerors per region (per category) will be recommended for the award of a Standing Offer. Note that there will be an unlimited number of qualified Offerors on the "Qualified List".

1.1. *Technical Evaluation*

1.1.1 **Mandatory Technical Criteria**

For Mandatory Technical Criteria refer to Attachment 1 to Part 4.

1.1.2 **Point Rated Technical Criteria**

For Mandatory Technical Criteria refer to Attachment 1 to Part 4.

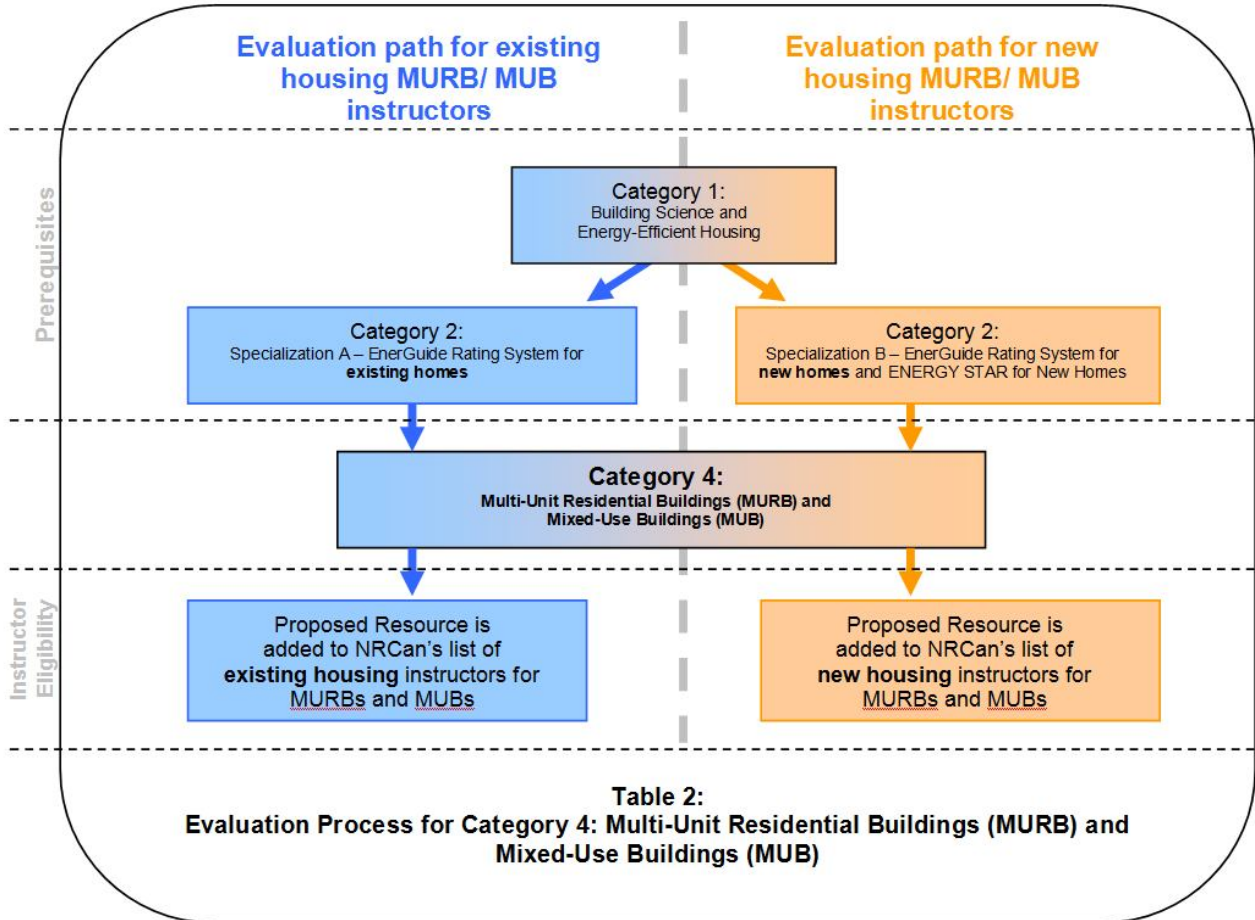
1.2 *Financial Evaluation*

- 1.2.1 For offer evaluation and Offeror(s) selection purposes only, the evaluated price of an offer will be determined in accordance with the Pricing Schedule in Attachment 1 to Part 3.



ATTACHMENT 1 TO PART 4 - TECHNICAL AND FINANCIAL CRITERIA

The table below illustrates the technical evaluation procedure





PART A - GENERAL QUALIFICATIONS (GQ) - CATEGORIES 1, 2, 3, 4

A.1 Mandatory Technical Criteria (GQ)

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Criteria will be deemed non-responsive and will be given no further consideration.

Proposals MUST demonstrate compliance with all of the following Mandatory Criteria and MUST provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple Resources. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource.

MANDATORY CRITERIA (GQ) PART A: CATEGORIES 1, 2, 3, 4 GENERAL QUALIFICATIONS		Proposal Page Number
1. Experience: The Bidder must demonstrate that they have access to a Resource who has ALL of the following:		
1.01	Working experience related to energy efficient construction, renovation or technology in the housing sector within the last five (5) years from the closing date of this RFSO. The Bidder must provide a short description of the Resource’s work experience that includes dates and required tasks.	
1.02	Current or past experience as a certified energy advisor, an R-2000 service provider (plan evaluator, inspector AND air tightness tester), a trainer or a quality assurance auditor for NRCan’s residential energy efficiency initiatives. The Bidder must provide the name of the Resource, the type of service provided and the program for which it was provided, as well as the dates during which the service was provided.	
1.03	Experience delivering training. The Bidder must certify that the proposed Resource has facilitated a minimum of five (5) classes or workshops on ANY topic since January 1, 2007 by providing the dates, locations and subject matter on which the training delivery experience was gained.	
1.04	Availability to write exam(s). The exam content and criteria is outlined in <i>Attachment 3 to Annex "A": Workshop Categories and Corresponding Proposal Evaluation Approach</i> . The passing marks and additional details regarding the exam will be provided to proponents who have met all of the Mandatory Criteria and obtained the required minimum number of points for the Point-Rated Evaluation Criteria.	
The Bidder must submit in its bid, a signed statement that it has or is able to obtain access to the items outlined in sections 2 through 4.		
2. Computer System - Hardware & Software		
2.01	Operating System: • Windows: Windows® XP (SP2, 32bit), or Vista® (32/64 Bit), or Windows 7® (32/64 Bit) or • Macintosh: Mac OS® X 10.5 or higher <i>Note: If using a Mac, you will have to install and run a licensed copy of Windows via</i>	



MANDATORY CRITERIA (GQ) PART A: CATEGORIES 1, 2, 3, 4 GENERAL QUALIFICATIONS		Proposal Page Number
	<p><i>Boot Camp 2.0 or later in order to run HOT2000, as HOT2000 is only supported by Windows.</i></p> <p><i>Boot Camp is a software utility included with Mac OS X 10.5 Leopard that allows you to run compatible versions of Microsoft Windows on an Intel-based Mac at native speeds. Other third-party alternatives are also available.</i></p>	
2.02	<p>Memory:</p> <ul style="list-style-type: none"> • 2 GB of RAM 	
2.03	<p>Software:</p> <ul style="list-style-type: none"> • Microsoft Office® 2003, or later versions 	
2.04	<p>Removable Storage: USB drive capabilities</p>	
2.05	<p>LCD Projector The LCD projector must meet or exceed the following specifications:</p> <ul style="list-style-type: none"> • Resolution: SVGA (800X600) or higher resolution, must have the same resolution as the laptop's • Display Type: LCD • Brightness: 1500 lumens or higher • Contrast: 1000:1 or higher 	
3. Internet:		
3.01	Valid email account	
3.02	Access to internet that supports email transfers of up to 7MB	
4. References:		
4.01	<p>The Bidder must provide contact information of three (3) training delivery services references (i.e., individuals that have knowledge of the Bidder's training ability.)</p> <p><i>Note: NRCan reserves the right to check references by contacting one or all of the references provided. NRCan also reserves the right to reject a Bidder if:</i></p> <ul style="list-style-type: none"> – <i>none of the references provided are available within one week from completion of bid evaluation;</i> – <i>the references do not confirm the skills and abilities required, as described in the General Qualifications point-rated criteria R-5;</i> – <i>the references do not confirm the linguistic ability required to offer services in the language identified by the Bidder at the beginning of Annex D.</i> 	—
5. Resources:		
5.01	The Bidder must provide Curriculum Vitae (CV) of the proposed Resource for the standing offer. Each CV should include details demonstrating any relevant activities related to the requirements and their ability to perform the tasks as described in the Statement of Work	



A.2 Point Rated Technical Criteria

The point rated technical criteria contained herein will be used by NRCan to evaluate proposals that have met the Mandatory Criteria for **Part A - General Qualifications**. These point-rated evaluation criteria apply only to **Part A - General Qualifications**.

Proposed Resources that do not meet all of the mandatory and point-rated evaluation criteria for Part A - General Qualifications will be given no further consideration.

Proposed Resources that are found to be compliant with:

- (a) meet all of the Mandatory Criteria for General Qualifications, and
- (b) obtain (or exceed) the stated Minimum Points Required for the point rated technical criteria under Part A- General Qualifications

Will be:

- Eligible to write a building science and energy-efficient housing exam which will assess qualifications for Category 1 - Building Science and Energy-Efficient Housing
- Evaluated for Category 2 - EnerGuide Rating System when an offer to provide Category 2 services (specialty A and/or specialty B) is stated in the proposal.

The Bidder may propose one (1) or more Resources for each category. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource.

Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based on the information contained within the Proposal and references.

Note: partial points may be awarded.

Criterion ID	Point Rated Technical Criteria PART A: CATEGORIES 1, 2, 3, 4 GENERAL QUALIFICATIONS	Maximum Points	Proposal Page #										
R1	<p>The Proposed Resource’s General Trainer Experience</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">Length of experience as a trainer on general building science, energy-efficient housing, the EnerGuide Rating System for existing or new homes, ENERGY STAR for New Homes or R-2000</td> </tr> <tr> <td style="width: 30%;">≥5 years</td> <td>12 points</td> </tr> <tr> <td>2 to <5 years</td> <td>8 points</td> </tr> <tr> <td>8 months to <2 years</td> <td>4 points</td> </tr> <tr> <td>1 to <8 months</td> <td>2 points</td> </tr> </table>	Length of experience as a trainer on general building science, energy-efficient housing, the EnerGuide Rating System for existing or new homes, ENERGY STAR for New Homes or R-2000		≥5 years	12 points	2 to <5 years	8 points	8 months to <2 years	4 points	1 to <8 months	2 points	12 points	
Length of experience as a trainer on general building science, energy-efficient housing, the EnerGuide Rating System for existing or new homes, ENERGY STAR for New Homes or R-2000													
≥5 years	12 points												
2 to <5 years	8 points												
8 months to <2 years	4 points												
1 to <8 months	2 points												
R2	<p>The Bidder should identify up to five (5) workshops related to NRCan energy-efficient housing initiative delivered by the proposed Resource since January 1, 2009 Information for each workshop should include:</p> <p>Workshop name, location, date(s) delivered, number of days of the workshop, number of attendees and workshop objectives and activities (<i>up to 2 points per workshop</i>);</p>	10 Points											
R3	<p>The Bidder should indicate that the proposed Resource has kept their knowledge of residential technologies and systems up-to-date by specifying up to four (4) continuing</p>	16 points											



Criterion ID	Point Rated Technical Criteria PART A: CATEGORIES 1, 2, 3, 4 GENERAL QUALIFICATIONS	Maximum Points	Proposal Page #
	<p>education courses in the field of low-rise housing construction or renovation, or residential heating, ventilation and air conditioning systems completed after January 1, 2007.</p> <p>Information required is:</p> <p>a) the name of the course(s) b) the name of the institution where the course was taken; and c) the year the course was taken.</p> <p><i>4 points per workshop</i></p>		
R4	<p>The Bidder should specify a minimum of three (3) continuing education courses/workshops acquired by the proposed Resource in the field of adult education, general education, public speaking or training.</p> <p>Include the following information for each course or workshop:</p> <p>a) the name of the course(s) b) the name of the institution where the course was taken; and c) the year the course was taken d) length of course e) objective and topic of the course f) any accreditation or certification obtained as a result of course or workshop completion</p> <p><u>A Maximum ten (10) points will be awarded as per the breakdown below:</u></p> <p>1) Accreditation or certification earned (<i>1 point per general accreditation or certification that required 40 hours of class time or less; 2 points per general accreditation or certification earned through general accreditation that required 41 hours of class time or more; 2 points per college or university diploma or degree.</i>)</p> <p>2) Depth and focus on adult education (<i>1 point per training that is focused on a different area, but touches on adult education; 2 points per training that is primarily focused on adult education.</i>)</p> <p>3) Depth and focus on general education or public speaking (<i>2 points if most training is focused on a different area but touches on general education or public speaking ; 4 points if most training is primarily focused on general education or public speaking.</i>)</p>	10 points	
R5	<p>References</p> <p>Please provide contact information (name, email and telephone number) for three (3) training delivery services references (i.e., individuals that have knowledge of the proposed Resource’s training ability, excluding NRCan staff):</p> <p><u>A maximum of 36 points will be awarded as per the breakdown below:</u></p> <ul style="list-style-type: none"> ➤ Organizational Skills (<i>maximum 6 points; 2 points per reference</i>) ➤ Punctuality (<i>maximum 6 points; 2 points per reference</i>) ➤ Ability to create a positive and supportive learning environment (<i>maximum 6 points; 2 points per reference</i>) ➤ Ability to communicate thoughts in a clear and organized manner (<i>maximum 6 points; 2 points per reference</i>) ➤ Ability to communicate in an engaging, interesting and effective manner (<i>maximum 6 points; 2 points per reference</i>) 	36 points	



Criterion ID	Point Rated Technical Criteria PART A: CATEGORIES 1, 2, 3, 4 GENERAL QUALIFICATIONS	Maximum Points	Proposal Page #
	<p>➤ Level of comfort with audience (<i>maximum 6 points; 2 points per reference</i>)</p> <p>The points awarded for this rated criteria is conditional on NRCan’s success in being able to contact the references provided and completion of reference checks</p> <p><i>Note: NRCan reserves the right to check references by contacting one or all of the references provided. NRCan also reserves the right to reject a Bidder should none of the references provided be available within one week from completion of bid evaluation and if in checking references, they do not confirm the skills and abilities required.</i></p>		
R6	<p>Spelling, Grammar, Sentence Structure and Organization of Proposal</p> <p>Five (5) points will be awarded based on proper use of grammar, correct spelling and proper sentence structure used throughout the proposal. In addition, five (5) points will be awarded on the logical organization of information within the proposal (e.g., how well organization of information facilitates locating information to support each evaluation criteria). (<i>Up to a maximum of 10 points</i>)</p>	10 points	
Minimum Passing Mark (60%):		56.40	
Total Possible Points:		94	

PART B - CATEGORY 2 - ENERGUIDE RATING SYSTEM

B.1 Mandatory Technical Criteria (Specialization A and B)

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Criteria will be given no further consideration for Category 2 - EnerGuide Rating System.

Proposals MUST demonstrate compliance with all of the following Mandatory Criteria and MUST provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple Resources. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource.



MANDATORY CRITERIA PART B: CATEGORY 2 - ENERTGUIDE RATING SYSTEM SPECIALIZATIONS A and B		Proposal Page Number
1. Experience: The Bidder must demonstrate that they have successfully adhered to the following:		
1.01	Only proposed Resources who have been identified by the Bidder as offering to provide services for Category 2 - EnerGuide Rating System AND have met the Mandatory Criteria and stated minimum points required for the Points-Rated Criteria for General Qualifications will be evaluated under Mandatory Evaluation Criteria Category 2 - EnerGuide Rating System.	
1.02	The Bidder must demonstrate that the proposed Resources has experience using a blower door and related equipment, such as manometers and blower door software. The Bidder must certify that the proposed Resource has performed a minimum of thirty (30) blower door tests on different houses since January 1, 2008 by providing the complete address of each house and the dates on which the tests were performed.	
1.03	<p>Availability to write exam(s).</p> <p>The exam content and criteria is outlined in <i>Attachment 3 to Annex "A": Workshop Categories and Corresponding Proposal Evaluation Approach</i>.</p> <p>The passing marks and additional details regarding the exam will be provided to proponents who have met all of the Mandatory Criteria and obtained the required minimum number of points for the Point-Rated Evaluation Criteria.</p>	
2. Equipment: The Bidder must submit in its bid, a signed statement that it has or is able to obtain access to a blower door that meets NRCan's Technical Specifications.		
2.01	<p>NRCan's Technical Specifications for Blower Doors are as follows:</p> <p><u>Fan:</u></p> <ul style="list-style-type: none"> • Variable speed control (solid-state control) • Must operate on 110 to 125 vac/60Hz supply • Minimum flow at maximum fan speed to be at least 2501 L/s (5300 CFM) at 50 Pa pressure difference • Must be able to both pressurize and depressurize the house • Calibration curves and test verification certificate must be included with each fan <p><u>Door Frame:</u></p> <ul style="list-style-type: none"> • Width: adjustable from 81.3 cm to 99 cm (32 inches to 39 inches) to fit a wide variety of doors or a suitably close range • Height: adjustable from 129.5 cm to 221 cm (51 inches to 87 inches) or a suitably close range • Door frame edge seal: flexible gasket or inflatable edge seal • Door frame material: Rigid airtight frame (e.g., wood, aluminum) • Door frame cover: Door panel(s) made of airtight material <p><u>Pressure and fan flow gauges:</u></p> <ul style="list-style-type: none"> • Digital pressure gauge for simultaneous or switchable display of pressure and airflow readings • Pressure gauge unit: Pa • Pressure range: 0 to 60 Pa (suggested for building pressure) • Measurement resolution: 0.1 Pa for digital micro-manometers • Gauge accuracy: ± 1.0 Pa for digital micro-manometers • Wind dampening should be built into pressure gauge or available as add-on • Calibration of pressure measurement as per CGSB Standard No. 149.10-M86 • Flow measurement unit L/s or CFM • Flow measurement resolution: 1/100 times the reading or better for digital micro-manometers • Flow accuracy: ± 5% • Flow range: capable of measuring a minimum airflow of 30 L/s (63 CFM) within its operating range • Calibration of flow measurement as per CGSB Standard No. 149.10-M86 <p><u>Calculation Procedures:</u></p> <ul style="list-style-type: none"> • Calculation software based on current calibration data for blower door selected to determine airtightness results. Data analysis procedure and reporting must meet requirements set in CGSB Standard No. 149.10-M86 • Calibration characteristics and technical manuals 	



Point-Rated Evaluation Criteria - Category 2: Specialization A - EnerGuide Rating System for Existing Homes

B.2 Point Rated Technical Criteria:

The criteria contained herein will be used by NRCan to evaluate the proposals that have met the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System.

The evaluation criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes will assess the proposed Resource's ability to provide training on topics such as:

- Blower door testing and air leakage identification
- Advanced geometry calculations
- Preparation for onsite evaluation and homeowner interaction for existing housing
- Data collection, including photographic documentation requirements for existing housing
- HOT2000 modeling for existing houses
- Developing energy-efficient upgrade recommendations for existing houses
- Preparation of homeowner reports
- Quality assurance procedures for existing houses

Only those Proposals that meet the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System and the minimum Point-Rated Evaluation Criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes will be eligible for further consideration as an Instructor for this category.

Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan's assessment will be based on the information contained within the Proposal.

Note: Half points may be awarded.

CRITERION ID	Point Rated Technical Criteria PART B: Category 2-Specialization A EnerGuide Rating System for Existing Homes	Maximum Points	Proposal Page #										
R1	Length of Experience in NRCan's Initiatives for Existing Homes The Bidder has demonstrated their proposed resource's experience (within the last 5 years from the closing date of this RFSO) in Natural Resources Canada's energy-efficiency housing initiatives by providing details of the tasks and work experience in relation to the roles outlined in the charts below.	20 Points											
R1A.	<p>A) The Proposed Resource's Energy Advisor Trainer Experience (<i>maximum 12 points</i>)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) <i>(maximum 12 points)</i></td> </tr> <tr> <td style="width: 50%;">≥5 years</td> <td>12 points</td> </tr> <tr> <td>2 to <5 years</td> <td>10 points</td> </tr> <tr> <td>1 to <2 years</td> <td>8 points</td> </tr> <tr> <td>6 months to <1 year</td> <td>6 points</td> </tr> </table>			Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) <i>(maximum 12 points)</i>		≥5 years	12 points	2 to <5 years	10 points	1 to <2 years	8 points	6 months to <1 year	6 points
Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) <i>(maximum 12 points)</i>													
≥5 years	12 points												
2 to <5 years	10 points												
1 to <2 years	8 points												
6 months to <1 year	6 points												
R1B.	<p>B) The Proposed Resource's Energy Advisor Experience (<i>maximum 8 points</i>)</p>												



CRITERION ID	Point Rated Technical Criteria PART B: Category 2-Specialization A EnerGuide Rating System for Existing Homes	Maximum Points	Proposal Page #								
	<table border="1"> <tr> <td colspan="2">Number of single-family home files evaluated and modeled for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)</td> </tr> <tr> <td>≥ 300 files</td> <td>8 points</td> </tr> <tr> <td>151 to <300 files</td> <td>6 points</td> </tr> <tr> <td>51 to 150 files</td> <td>2 points</td> </tr> </table>	Number of single-family home files evaluated and modeled for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)		≥ 300 files	8 points	151 to <300 files	6 points	51 to 150 files	2 points		
Number of single-family home files evaluated and modeled for NRCan's residential energy efficiency initiatives for existing homes (e.g., ecoENERGY Retrofit - Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)											
≥ 300 files	8 points										
151 to <300 files	6 points										
51 to 150 files	2 points										
Minimum Passing Mark:		14									
Total Possible Points:		20									

Point-Rated Evaluation Criteria - Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes

B.3 Point Rated Technical Criteria:

The criteria contained herein will be used by NRCan to evaluate the proposals that have met the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System.

The evaluation criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes will assess the proposed Resource's ability to provide training on topics such as:

- Blower door testing and air leakage identification
- Advanced geometry calculations
- Preparation for onsite evaluation and homeowner/ builder interaction for new housing
- Plan evaluation procedures
- Data collection, including photographic documentation requirements for new housing
- HOT2000 modeling for new houses
- Developing energy-efficient upgrade recommendations for new houses
- Preparation of homeowner/builder reports
- Quality assurance procedures for new houses
- ENERGY STAR for New Homes administrative and technical procedures

Only those Proposals that meet the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System and the minimum Point-Rated Criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes will be eligible for further consideration as an Instructor for this category.

Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan's assessment will be based on the information contained within the Proposal.

Note: Half points may be awarded.

Criterion ID	Point Rated Technical Criteria PART B: Category 2 - Specialization B EnerGuide Rating System for New Homes and ENERGY STAR for New Homes	Maximum Points	Proposal Page #
R-1	<p>Length of Experience in NRCan's Initiatives for New Homes</p> <p>The Bidder has demonstrated their proposed resource's experience (within the last 5 years of this RFP) in Natural Resources Canada's energy-efficient new housing initiatives by providing details of the tasks and work experience in</p>	20 Points	



Criterion ID	Point Rated Technical Criteria PART B: Category 2 - Specialization B EnerGuide Rating System for New Homes and ENERGY STAR for New Homes	Maximum Points	Proposal Page #								
R1A.	relation to the roles outlined in the charts below.										
	<p>A) The Proposed Resource’s Energy Advisor Trainer Experience (<i>maximum 12 points</i>)</p> <table border="1"> <tr> <td colspan="2">Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>maximum 12 points</i>)</td> </tr> <tr> <td>≥5 years</td> <td>12 points</td> </tr> <tr> <td>2 to <5 years</td> <td>10 points</td> </tr> <tr> <td>1 to <2 years</td> <td>8 points</td> </tr> <tr> <td>6 months to <1 year</td> <td>6 points</td> </tr> </table>			Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>maximum 12 points</i>)		≥5 years	12 points	2 to <5 years	10 points	1 to <2 years	8 points
Length of experience training energy advisors or other residential energy efficiency initiative participants for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>maximum 12 points</i>)											
≥5 years	12 points										
2 to <5 years	10 points										
1 to <2 years	8 points										
6 months to <1 year	6 points										
R1B.	<p>B) The Proposed Resource’s Energy Advisor Experience (<i>maximum 8 points</i>)</p> <table border="1"> <tr> <td colspan="2">Number of single-family home files evaluated and modeled for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)</td> </tr> <tr> <td>≥ 100 files</td> <td>8 points</td> </tr> <tr> <td>41 to <100 files</td> <td>6 points</td> </tr> <tr> <td>10 to 40 files</td> <td>2 points</td> </tr> </table>	Number of single-family home files evaluated and modeled for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)		≥ 100 files	8 points	41 to <100 files	6 points	10 to 40 files	2 points		
Number of single-family home files evaluated and modeled for NRCan’s residential energy efficiency initiatives for new homes (e.g., EnerGuide Rating System for new homes or ENERGY STAR for New Homes program) (<i>Only include files for which the bidder has performed all functions, including the data collection, blower door testing, report preparation and HOT2000 modeling</i>) (<i>maximum 8 points</i>)											
≥ 100 files	8 points										
41 to <100 files	6 points										
10 to 40 files	2 points										
Minimum Passing Mark:		14									
Total Possible Points:		20									

PART C - CATEGORY 3 - R-2000

C.1 Mandatory Technical Criteria

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Criteria will be given no further consideration for Category 3 - R-2000.

Proposals MUST demonstrate compliance with all of the following Mandatory Criteria and MUST provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple Resources. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource.



MANDATORY CRITERIA PART C: Category 3 - R-2000		Proposal Page Number
1	Only proposed Resources who have been identified by the Bidder to provide services for Category 3 - R-2000 AND have met the Mandatory Evaluation Criteria for Part B - Category 2 - EnerGuide Rating System and the Point-Rated Evaluation Criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes will be evaluated under Mandatory Evaluation Criteria Category 3 - R-2000.	
2	<p>Availability to write exam(s).</p> <p>The exam content and criteria is outlined in <i>Attachment 3 to Annex "A": Workshop Categories and Corresponding Proposal Evaluation Approach</i>.</p> <p>The passing marks and additional details regarding the exam will be provided to proponents who have met all of the Mandatory Criteria and obtained the required minimum number of points for the Point-Rated Evaluation Criteria.</p>	

**Point-Rated Evaluation Criteria
Category 3 - R-2000**

C.2 Point Rated Technical Criteria:

The criteria contained herein will be used by NRCan to evaluate the proposals that have met the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System and the Point-Rated Evaluation Criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes.

The evaluation criteria for Category 3 - R-2000 will assess the proposed Resource’s ability to train prospective R-2000 plan evaluators, inspectors and airtightness testers.

Only those Proposals that meet the Mandatory Evaluation Criteria and minimum Point-Rated Evaluation Criteria for Category 3 - R-2000 will be eligible for further consideration as an Instructor for this category.

Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based on the information contained within the Proposal and references.

Note: Half points may be awarded.

Criterion ID	Point Rated Technical Criteria PART C: Category 3 - R-2000	Maximum Points	Proposal Page #
R1	<p>Length of Experience in NRCan’s R-2000 Initiative</p> <p>The Bidder has demonstrated that the Resource has experience (within the last 5 years from the closing date of this RFSO) in Natural Resources Canada’s R-2000 initiative by providing details of the tasks and work experience in relation to the roles outlined in the charts below.</p>	20 Points	



R1A.	A) The Proposed Resource's R-2000 Trainer Experience (maximum 5 points)			
	Length of experience training service providers, builders or other participants for NRCan's R-2000 initiative (maximum 5 points)			
	≥5 years	5 points		
	2 to <5 years	4 points		
	1 to <2 years	3 points		
	6 months to <1 year	2 point		
R1B	B) The Proposed Resource's R-2000 Service Provider Experience (maximum 15 points)			
	Length of experience as an airtightness tester for NRCan's R-2000 initiative (maximum 5 points)		Length of experience as a plan evaluator for NRCan's R-2000 initiative (maximum 5 points)	
	≥5 years	5 points	≥5 years	5 points
	2 to <5 years	3 points	2 to <5 years	3 points
	8 months to <2 years	2 points	8 months to <2 years	2 points
	1 to <8 months	1 point	1 to <8 months	1 point
	Length of experience as an Inspector for NRCan's R-2000 initiative (maximum 5 points)			
	≥5 years	5 points		
	2 to <5 years	3 points		
	8 months to <2 years	2 points		
1 to <8 months	1 point			
			Minimum Passing Mark:	14
			Total Possible Points:	20

PART D - CATEGORY 4 - MULTI-UNIT RESIDENTIAL AND MIXED-USE BUILDINGS

D.1 Mandatory Technical Criteria

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals that fail to meet the Mandatory Criteria will be given no further consideration for Category 4 - Multi-Unit Residential and Mixed-Use Buildings.

Proposals MUST demonstrate compliance with all of the following Mandatory Criteria and MUST provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple Resources. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource.



MANDATORY CRITERIA PART D: CATEGORY 4 Multi-Unit Residential and Mixed-Use Buildings		Proposal Page #
1	<p>Only proposed Resources who have been identified by the Bidder as offering to provide services for Category 4 - Multi-Unit Residential and Mixed-Use Buildings AND have met the Mandatory Criteria for Category 2 - EnerGuide Rating System and stated minimum points required for the Point-Rated Criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes AND/OR Specialization B - EnerGuide Rating System For New Homes and ENERGY STAR for New Homes will be evaluated under Mandatory Evaluation Criteria Category 4 - Multi-Unit Residential and Mixed-Use Buildings.</p> <p>NOTE: Proposed resources who were found to be qualified under the point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes and all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings will be eligible to provide services for existing Multi-Unit Residential and Mixed-Use Buildings.</p> <p>Proposed resources who were found to be qualified under the point-rated criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes and all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings will be eligible to provide services for new Multi-Unit Residential and Mixed-Use Buildings.</p>	
2	<p>Availability to write exam(s).</p> <p>The exam content and criteria is outlined in <i>Attachment 3 to Annex "A": Workshop Categories and Corresponding Proposal Evaluation Approach</i>.</p> <p>The passing marks and additional details regarding the exam will be provided to proponents who have met all of the Mandatory Criteria and obtained the required minimum number of points for the Point-Rated Evaluation Criteria.</p>	

Point-Rated Evaluation Criteria - Category 4 - Multi-Unit Residential and Mixed-Use Buildings

D.2 Point Rated Technical Criteria:

The criteria contained herein will be used by NRCan to evaluate the proposals that have met the Criteria for Category 2 - EnerGuide Rating System and the Point-Rated Evaluation Criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes AND/OR Specialization B - EnerGuide Rating System For New Homes and ENERGY STAR for New Homes.

The evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings will assess the proposed Resource's ability to provide training related to multi-unit residential and mixed-use buildings on topics such as:

- Eligibility and pre-screening
- Data Collection
- Blower door testing and air leakage identification
- HOT2000 modeling
- Preparation for onsite evaluation and client interaction
- Advanced geometry calculations
- Developing energy-efficient upgrade recommendations for new or existing buildings
- Preparation of client reports
- Reporting evaluation results
- Quality assurance procedures



Only those Proposals that meet with the Mandatory Evaluation Criteria and minimum Point-Rated Evaluation Criteria for Category 4 – Multi-Unit Residential and Mixed-Use Buildings will be eligible for further consideration as an Instructor for this category.

Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based on the information contained within the Proposal and references.

Note: Half points may be awarded.

Criterion ID	Point Rated Technical Criteria PART D: Category 4 Multi-Unit Residential and Mixed-Use Buildings	Maximum Points	Proposal Page #								
R-1	<p>Length of Experience in NRCan’s Housing Initiatives</p> <p>The Bidder has demonstrated that the Resource has experience (within the last 5 years from the closing date of this RFSO) in Natural Resources Canada’s energy-efficiency housing initiatives by providing details of the tasks and work experience in relation to the roles outlined in the charts below.</p>	12 Points									
R-1A.	<p>A) The Proposed Resource’s MURB/MUB Trainer Experience (<i>maximum 6 points</i>)</p> <table border="1" data-bbox="196 1010 1143 1262"> <tr> <td colspan="2" data-bbox="196 1010 1143 1129">Length of experience providing training on MURBs/MUBs for any of NRCan’s residential energy efficiency initiatives (<i>maximum 12 points</i>)</td> </tr> <tr> <td data-bbox="196 1129 834 1163">≥5 years</td> <td data-bbox="834 1129 1143 1163">12 points</td> </tr> <tr> <td data-bbox="196 1163 834 1197">2 to <5 years</td> <td data-bbox="834 1163 1143 1197">10 points</td> </tr> <tr> <td data-bbox="196 1197 834 1230">1 to <2 years</td> <td data-bbox="834 1197 1143 1230">8 points</td> </tr> <tr> <td data-bbox="196 1230 834 1262">6 months to <1 year</td> <td data-bbox="834 1230 1143 1262">6 point</td> </tr> </table>			Length of experience providing training on MURBs/MUBs for any of NRCan’s residential energy efficiency initiatives (<i>maximum 12 points</i>)		≥5 years	12 points	2 to <5 years	10 points	1 to <2 years	8 points
Length of experience providing training on MURBs/MUBs for any of NRCan’s residential energy efficiency initiatives (<i>maximum 12 points</i>)											
≥5 years	12 points										
2 to <5 years	10 points										
1 to <2 years	8 points										
6 months to <1 year	6 point										
Minimum Passing Mark:		8									
Total Possible Points:		12									



PART E BONUS POINTS

The Proposed Resource’s Quality Assurance Experience *(maximum 4 points)*

The bonus points will be added to the total points awarded. This may increase the bidder’s ranking under this RFSO.

Criterion ID	PART D: BONUS POINTS Quality Assurance Experience	Maximum Points	Proposal Page #
R-1A.	Length of experience performing quality assurance (for either a service organization or for NRCan) on NRCan’s residential energy efficiency initiatives. <i>(maximum 4 points)</i> ≥5 year = 4 points 2 to <5 years = 3 points 8 months to <2 years = 2 points 1 to <8 months = 1 point		
Total des points:		4	



PART 5 - CERTIFICATIONS

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

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

1. Certifications Required with the Offer

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

1.1 Federal Contractors Program - Certification

Federal Contractors Program for Employment Equity - \$200,000 or more

1. The Federal Contractors Program for Employment Equity (FCP-EE) requires that some suppliers bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder is subject to the FCP-EE, evidence of its commitment must be provided before the award of the Contract.

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

2. If the Bidder does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form [LAB 1168](#), Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.
3. The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- (a) () is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- (b) () is not subject to the FCP, being a regulated employer under the [Employment Equity Act](#), S.C. 1995, c. 44;



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

Further information on the [FCP](#) is available on the HRSDC Web site.

Signature of Authorized Company Official

Date

1.2 Former Public Servant Certification

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

Definitions

For the purposes of this clause,

"Former public servant" means a 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 and includes:

- (a) An individual;
- (b) An individual who has incorporated;
- (c) A partnership made up of former public servants; or
- (d) 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 Public Service.

"pension" means, in the context of the fee abatement formula, 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 (FPS) in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES** () **NO** ()

If so, the Bidder must provide the following information:



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

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES**
() **NO** ()

If so, the Bidder must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

Certification

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

1.3 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

Signature of Authorized Company Official

Date

1.4 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified



by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

Signature of Authorized Company Official

Date

1.5 Contractual Capacity and Joint Venture Contractual Capacity

The Bidder shall have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business.

Joint Venture - a joint venture is an association of two or more parties who temporarily combine their money, property, knowledge, or other resources in a joint business enterprise. There are two types of joint ventures, the incorporated joint venture and the contractual joint venture, i.e., formed through a contractual agreement between the parties. The following information should be provided with the proposal: type of joint venture (incorporated or contractual), the names and addresses of the members of the joint venture.

If a Contract is awarded to a contractual joint venture all members of the joint venture shall be jointly and severally or solidarily liable for the performance of the contract.

Certification

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.



PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

1. Security Requirement

There is no security considerations associated with this requirement

2. Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.



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

There are no security considerations associated with this requirement

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 (2013-03-01) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

The text under Subsections 4 and 5 of Section 11 - Code of Conduct and Certifications - Standing Offer of 2005 referenced above are deleted in their entirety

3.2 Standing Offers Reporting

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

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

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

The quarterly reporting periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31;

4th quarter: January 1 to March 31.



The data must be submitted to the Standing Offer Authority no later than thirty (30) calendar days after the end of the reporting period.

4. Term of Standing Offer

The Standing Offer shall be valid for a period of twenty four (24) months from award date.

4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from award date to _____ <to be inserted at award>.

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 three (3) additional twelve (12) month periods, 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 fifteen (15) 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:

Name: **Valerie Holmes**
 Title: Senior Procurement Officer
 Address: 580 Booth Street, 5th Floor, Room 5-D6-3
 Telephone: (613) 943-3580
 Facsimile: (613) 947-5477
 E-mail address: Valerie.holmes@nrcan-rncan.gc.ca

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

5.2 Project Authority

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

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

5.3 Offeror's Representative <to be inserted at award>

Name: _____
 Telephone: _____



Facsimile: _____
Email: _____

6. Identified Users

The Identified User authorized to make call-ups against the Standing Offer is: Department of Natural Resources Canada.

7. Work Allocation and Call-up Procedures

A. Call-ups can be issued to the qualified Standing Offer holder as identified in the Standing Offer, meeting all the requirements outlined in the Statement of Work (SOW). For each requirement, the Project Authority will provide the **first ranked** Offeror (per category per region) with details of the Work activities to be performed within the scope of this Standing Offer (Request for Availability) including a description of the deliverables, level of effort, location, etc. The Offeror should respond back with a proposal within forty eight (48) hours of receiving the Request.

Work will be allocated based on the following criteria:

- i) Category of the work;
- ii) City and Region in which training is to take place,
- iii) Availability of the resource (s)

B. NRCan will use the Standing Offer as deemed necessary, and reserves the right to use other methods of supply at its sole discretion as appropriate.

C. Given the nature of the services covered under the Standing Offer, the **Contracting Authority** reserves the right for final selection of the Offeror for any call-up made pursuant to the Standing Offer relating to the required services, should it be deemed necessary for continuity purposes and/or to reduce Travel and Living expenses.

8. Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using form 942, Call-up Against a Standing Offer.

9. Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed **\$100,000.00** (Goods and Services Tax or Harmonized Sales Tax included). The approximately value of this Standing Offer is approximately **\$630,000.00** for the full term of the Standing Offer.

10. Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- a) the Call up against the Standing Offer, including any annexes;
- b) the Articles of the Standing Offer;
- c) the General Conditions 2005 (2014-03-01), General Conditions - Standing Offers - Goods or Services
- d) the Supplemental General Conditions identified herein;
- 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) the Offeror's offer dated _____

11. Certifications

11.1 Compliance

Compliance with the certifications provided by the Offeror is a condition of authorization of the Standing Offer and subject to verification by Canada during the term of the Standing Offer and of any resulting contract that would continue beyond the period of the Standing Offer. In the event that the Offeror does not comply with any certification or 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.

11.2 SACC Manual Clauses

M3020C (2010-01-11), Status and Availability of Resources
M3800C (2006-08-15), Estimates

12. Applicable Laws

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

B. RESULTING CONTRACT CLAUSES

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

1. Statement of Work

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

2. Standard Clauses and Conditions

2.1 General Conditions

2035 (2014-03-01), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.
2005 (2014-03-01), General Conditions - Standing Offers - Goods or Services, apply to and form part of the Contract.

2.2 Supplemental General Conditions

The following clauses apply to this contract:

2.2.1 Dispute Resolution

Mediation

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

Arbitration



If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

Meaning of "Dispute"

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

Organizations are encouraged to select from one of the following two options:

Option 1:

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act will, on request or consent of the parties to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

Option 2:

Each party hereby:

- a) consents to fully participate in and bear the cost of any dispute resolution process proposed by the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act to resolve a dispute between the parties respecting the interpretation or application of a term or condition this contract; and
- b) agrees that this provision shall, for purposes of section 23 of the Procurement Ombudsman Regulations, constitute such party's agreement to participate in and bear the cost of such process.

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

2.2.2 Withholding Tax of 15 Percent

The Contractor agrees that, pursuant to the provisions of the Income Tax Act, Canada is empowered to withhold an amount of 15% of the price to be paid to the Contractor, if the Contractor is a non-resident Contractor as defined in said Act. This amount will be held on account with respect to any liability for taxes which may be owed to Canada.

2.2.3 Foreign Nationals (Canadian Contractor) *(To be completed at contract award)*

SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

OR



2.2.3 Foreign Nationals (Foreign Contractor) *(To be completed at contract award)*

SACC Manual clause A2001C (2006-06-16) Foreign Nationals (Foreign Contractor)

2.2.4 Values and Ethics Code

In carrying out the Work under the terms and conditions of this Contract, the Contractor shall adhere to the provisions and practices of the Values and Ethics Code for the Public service (2003), namely, but not restricted to, the provisions pertaining to Respect for Diversity, Human Dignity and People Values. The following link provides the policy reference. http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tb_851/vec-cve-eng.asp

2.2.5 Closure of Government Offices

Contractor employees are personnel of the Contractor and are paid by the Contractor on the basis of services rendered. Where Contractor's employees are providing services on government premises pursuant to this contract and the said premises become non-accessible due to evacuation or closure of government offices and consequently no work is being performed as a result of the closure, Canada will not be liable for payment to the Contractor for the period of the closure.

2.2.6 Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada 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: .

“to generate knowledge and information for public dissemination”

NRCan reserves the right to grant, upon written request, a license to exercise the required Intellectual Property Rights in such Canada-owned information to the successful Contractor.
For reference, the Treasury Board Site is:

http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/contracting/tipaucpca1-eng.asp#_Toc490365246

SACC Manual clause 4007 - Canada to Own Intellectual Property Rights in Foreground Information (2010-08-16).

2.2.7 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.

2.3 SACC Manual Clauses

C2000C (2007-11-30), Taxes - Foreign-based Contractor
C0711C (2008-05-12), Time Verification
C0305C (2008-05-12), Cost Submission
C0705C (2010-01-11), Discretionary Audit

3. Term of Contract

3.1 Delivery Date

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



3.2 Period of the Contract

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

4. Payment

4.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex "B", to a limitation of expenditure of \$_____ (TBD in resulting call-ups). Customs duties are included, and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable

4.2 Limitation of Price

SACC Manual clause C6000C (2011-05-16) Limitation of Price

4.3 Method of Payment

Once of the following methods of payment shall be used in each resulting call-up against the SO

- SACC Manual clause H1000C (2008-05-12), Single Payment
- SACC Manual clause H1008C (2008-05-12), Monthly Payment
- SACC Manual clause H3010C (2010-01-11), Milestone Payment

5. Invoicing Instructions

Invoices shall be submitted using one of the following methods:

E-mail:

OR Fax:

Invoicing-Facturation@NRCan-RNCan.gc.ca

Local NCR region: **613-947-0987**
Toll-free: **1-877-947-0987**

Note:

Attach "PDF" file. No other formats will be accepted

Note:

Use highest quality settings available.

Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers:

Call-up number: <provided at time of issuance of call-up>

5.1 Supplemental Invoicing Instructions

Pursuant to paragraph 221 (1) (d) of the Income Tax Act, payments made by departments and agencies to Contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Supplementary Slip. To enable departments and agencies to comply with this requirement, Contractors are required to provide information as to their legal name and status, business number, and/or Social Insurance Number or other identifying supplier information as applicable, along with a certification as to the completeness and accuracy of the information. To this end, the form entitled "T1204



6. Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.



ANNEX "A" - STATEMENT OF WORK

SW1 Title

Provision of Training Services for Natural Resources Canada's (NRCan's) EnerGuide Rating System and related initiatives.

SW2 Definitions of Key Terms:

Bidder:	An individual or company that has submitted a proposal for the provision of services under this (Request for Proposals) RFP. Bidders can submit a proposal identifying either themselves or a third-party as the Resource/Instructor.
Blower Door:	A blower door is a diagnostic tool used to measure the airtightness of buildings. The diagnostic analysis can also locate air leakage locations and determine whether or not extra air sealing and ventilation measures are required. The blower door is also used to check whether the ventilation system and exhaust appliances are depressurizing a house, which can create the potential for pressure-induced combustion spillage inside the house.
Certified Energy Advisor (CEA):	An individual who has been trained and has a license with NRCan to conduct the energy evaluation of new or existing houses under NRCan's energy efficiency housing initiatives, as well as to provide clients with add-on services such as renovation upgrade recommendations and plan evaluations.
Contractor:	A Bidder (individual or company) that has submitted a successful proposal for the provision of services under this RFP and has been successful under this RFSO.
ENERGY STAR ⁷ :	The international ENERGY STAR symbol helps consumers identify products that are among the most energy-efficient on the market. In Canada, the ENERGY STAR symbol is in use for the following categories: <u>home appliances, heating, cooling and ventilation, lighting and signage, consumer electronics, office equipment, windows and doors, commercial and industrial products and new homes.</u>
Existing House/Housing:	For the purpose of NRCan's Existing Housing initiative, eligible houses must meet the criteria as defined under the definition of House/Housing. To be eligible, an existing house must be complete and in an eligible state (i.e. complete building envelope, functional mechanical systems in place, etc.) and must be at least 6 months old, based on the date of occupancy by the first owner.
HOT2000 TM :	HOT2000 is an energy analysis, simulation and design software for low-rise residential buildings. Up-to-date heat loss/gain calculations and system analysis models provide an accurate means of evaluating a building's performance. This simulation takes into account the thermal effectiveness of the building and its components, the passive solar heating owing to the location of the building and the operation and performance of the building's mechanical systems.



	See http://www.sbc.nrcan.gc.ca/software_and_tools/hot2000_e.asp for more details.
House/Housing:	For the purpose of NRCan’s housing initiatives, any eligible house must be covered under either Part 9 (low-rise, detached, semi-detached and row houses) of the National Building Code of Canada and have a building area of 600m ² or less. Low-rise multi-unit residential buildings (MURBs) and Mixed-use buildings (MUBs) may also be eligible provided they meet the eligibility requirements. See the definitions of MURBs and MUBs in this document for more information.
Instructor/Resource:	An individual who has been prequalified through this RFP to provide, as and when requested, training services for NRCan’s energy efficiency housing initiatives for new or existing housing, which include the delivery of various workshops, the mentoring and supervision of students during their probationary field training and other related training services.
Low-Rise Multi-Unit Residential Building (MURB):	A multi-unit residential building (MURB) is a low-rise building that: <ul style="list-style-type: none"> contains a physically separate set of stacked residential units having a private entrance either outside the building or from a common hall, lobby, vestibule or stairway inside the building. The entrance to any residential unit must be one that can be used without passing through anyone else’s living quarters. Row houses, single detached or semi-detached houses are not considered as MURBs as they do not feature stacked residential units. Secondary suites do not qualify as MURB units; incorporates a minimum of two stacked residential units, and is a minimum of two storeys above grade; and comprises up to 32 residential units, counting all residential units, non-residential units and common areas. <p>See the “<i>Evaluation Procedures for Low-Rise Multi-Unit Residential and Mixed-Use Buildings</i>” document for a complete list of MURB eligibility criteria.</p>
Mixed-use Buildings (MUBs):	Mixed-use Buildings (MUBs) are MURBs in which a minimum of 50% of the building is used for residential purposes and the remaining space has other qualifying uses. See the “ <i>Evaluation Procedures for Low-Rise Multi-Unit Residential and Mixed-Use Buildings</i> ” document for a complete list of MUB eligibility criteria.
New House/Housing:	For the purpose of NRCan’s New Housing initiatives, any eligible house must meet the criteria defined under the definition of House/Housing. In addition, a new house can be at any evaluation stage (starting from the plan evaluation stage up to final completion) but must not be any older than 6 months starting from the date of occupancy permit/construction completion.



On-site Training:	Training that is provided on-site, such as the demonstration of the energy evaluation of an actual house, including the blower door test and the verification and data collection of the house characteristics.
Previous Program Energy Advisor (PPEA)	An individual who was a certified energy advisor under NRCan’s residential energy efficiency programs before the next generation of programs and initiatives was introduced.
Probationary Field Training:	Under NRCan’s housing initiatives, students who attend the required workshop(s) are then subject to probationary field training which includes: <ul style="list-style-type: none"> • a required number of energy evaluations in the presence of the Instructor • a required number of unsupervised energy evaluations.
Project Authority (PA):	The NRCan representative that the Contractor is accountable to. The project authority is responsible for all matters concerning the technical content of the work under the contract.
Proposed Trainer:	An individual who has been put forth by their service organization (SO) to become a trainer. The “proposed trainer” does not become a “trainer” until they have successfully completed all of NRCan’s training requirements.
Quality Assurance Auditor (QAA):	An individual who is contracted with NRCan to provide quality assurance auditing services for various housing initiatives offered by NRCan.
Request for Standing Offer (RFSO)	A RFSO is an invitation to suppliers to provide NRCan with an offer. The quantity of goods, level of services and estimated expenditure specified in the RFSO are only an approximation of requirements given in good faith. A RFSO does not commit NRCan to authorize the utilization of a standing offer or to procure or contract for any goods, services or both. A standing offer is not a contract. The issuance by NRCan of a Standing Offer and Call-up Authority (SOCA) to successful suppliers and to departments and agencies authorized to make call-ups does not constitute an agreement by Canada to order any or all of the goods, services or both offered. Departments and agencies may make one or several call-ups against a standing offer.
Residential Unit:	A residential unit is defined as a part of a building which is intended to be used as a home, residence or sleeping place by one or more persons maintaining a common household (which includes a kitchen, a bathroom and a bedroom).
Service Organization (SO):	An organization that has an agreement with NRCan to implement and deliver NRCan’s energy efficiency housing initiative(s).
Trainer:	An individual who has successfully completed all of NRCan’s training requirements in order to become a qualified trainer for their service organization.
Train-the-Trainer (TTT):	A training session designed to provide individuals with information and tools required to teach others.



SW3 Background

Natural Resources Canada’s (NRCan’s) Office of Energy Efficiency (OEE) administers several voluntary, residential energy efficiency initiatives. The primary objective of these initiatives is to improve the energy efficiency of new and existing low-rise housing in Canada. While the details and procedures may vary, each initiative uses the EnerGuide Rating System (ERS) to measure the level of energy efficiency of a home.

To support these initiatives, NRCan provides training and training materials to service organizations (SO) and other stakeholders across Canada on topics such as the administrative and technical procedures related to its residential energy efficiency initiatives and the use of HOT2000 or recognized modeling tools.

The purpose of this RFSO is to qualify a list of experienced Instructors that NRCan can call upon to teach and evaluate train-the-trainer workshop participants for all housing initiatives.

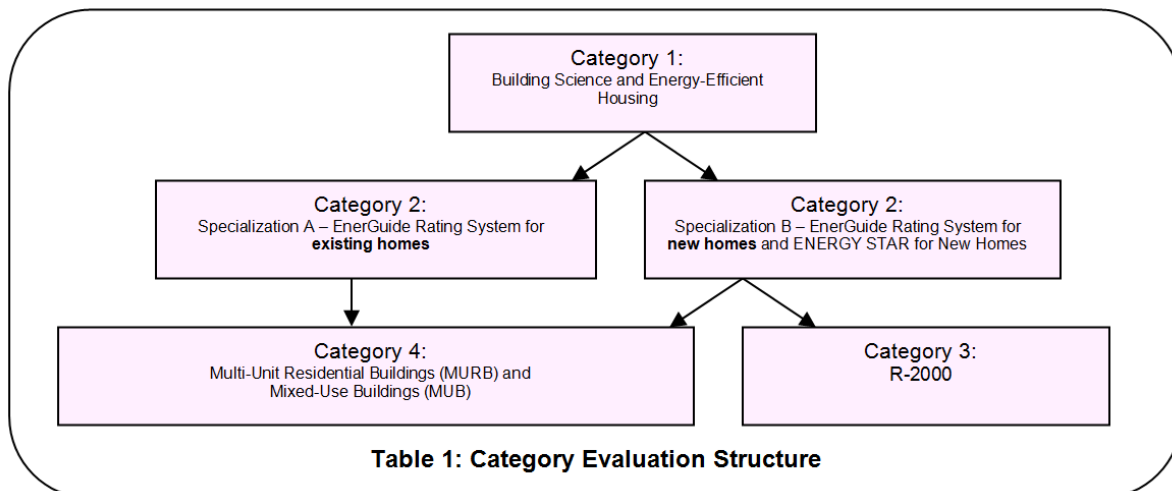
SW4 Bidder Requirements

The term “Resource” or “Instructor” used in this Statement of Work refers to an individual who has been proposed by the Bidder and has successfully met the requirements listed in Appendix D. When the Bidder is a company representing more than one proposed Instructor (Resource), the Bidder is required to submit a separate proposal for each proposed Instructor.

This RFP will qualify instructors to offer training in one or more of the following categories:

- Category 1: Building Science and Energy-Efficient Housing
- Category 2: EnerGuide Rating System
 - Specialization A - EnerGuide Rating System for **existing homes**
 - Specialization B - EnerGuide Rating System for **new homes** and ENERGY STAR for New Homes
- Category 3: R-2000
- Category 4: Multi-Unit Residential Buildings (MURB) and Mixed-Use Buildings (MUB)

All Bidders must successfully demonstrate that they have a Resource who is qualified to provide services for Category 1 as a minimum. The Resource must be found to be qualified for Category 1 and Category 2: Specialization B in order to provide services for Category 3. The Resource must be found to be qualified for the provision of services for Category 1 and Category 2 (Specialization A and/or B) in order to provide services for Category 4. Table 1 below provides an overview of the category evaluation structure.





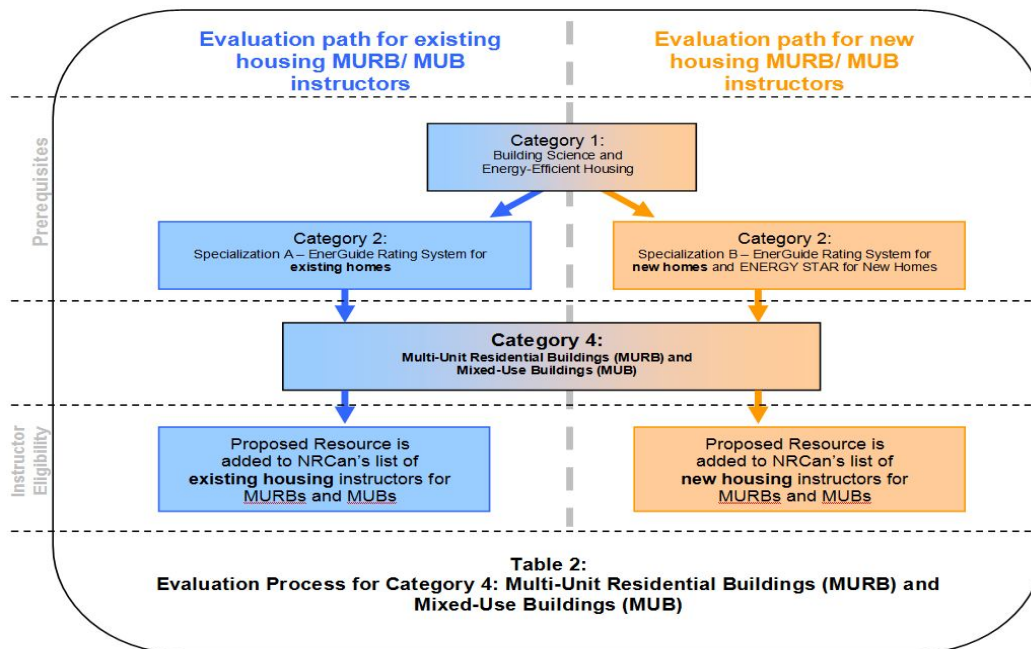
When proposing resources for Category 4, note that proposed resources will be eligible to provide services for **existing** Multi-Unit Residential and Mixed-Use Buildings if they were found to be qualified under:

- the point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes; and
- all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings,

Proposed resources will be eligible to provide services for **new** Multi-Unit Residential and Mixed-Use Buildings if they were found to be qualified under:

- the point-rated criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes; and
- all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings.

Table 2 below illustrates this evaluation process.



Bidders who do not have a Resource that can provide services for all workshop categories can submit a proposal that identifies one or more categories. Instructors will be expected to teach any of the workshops listed in the workshop categories for which they are found to be qualified.

Bidders should submit one proposal per Resource and are required to clearly identify in which official language (English and/or French) the Resource will be providing the services as well as the workshop category(ies) and specialization(s) for which the Resource will offer the services.

Refer to Appendix C which details the evaluation procedures for each workshop category and Appendix D which contains the evaluation criteria for each category.

SW5 Scope

The Instructor will be required to facilitate train-the-trainer workshops for the EnerGuide Rating System (ERS) and energy-efficient housing initiatives that are administered by the OEE. This includes initiatives



that are currently being offered and possibly any initiatives that are developed while in possession of a standing offer with NRCan.

This RFP will qualify instructors to offer training in one or more of the following categories:

Category 1 - Building Science and Energy-Efficient Housing

- o This type of training is intended primarily for builders and covers topics such as:
 - building science principles
 - the house-as-a-system concept
 - energy-efficient mechanical systems
 - energy-efficient construction/renovation practices and materials
 - air sealing
 - indoor air quality, ventilation and combustion spillage
 - renewable technologies

Category 2 - EnerGuide Rating System

This type of training is intended for prospective program participants such as energy advisors, service organizations, quality assurance specialists and covers topics related to the technical and administrative procedures for the relevant initiative(s) as well as:

- Blower door testing and air leakage identification
- Advanced geometry calculations

<p>Specialization A - EnerGuide Rating System for existing homes In addition to the items listed above, prospective existing housing program participants will receive training that covers:</p> <ul style="list-style-type: none"> ▪ Preparation for onsite evaluation and homeowner interaction for existing housing ▪ Data collection, including photographic documentation requirements for existing housing ▪ HOT2000 modeling for existing houses ▪ Developing energy-efficient upgrade recommendations for existing houses ▪ Preparation of homeowner reports ▪ Quality assurance procedures for existing houses 	<p>Specialization B - EnerGuide Rating System for new homes and ENERGY STAR for New Homes In addition to the items listed above, prospective new housing program participants will receive training that covers:</p> <ul style="list-style-type: none"> ▪ Preparation for onsite evaluation and homeowner/ builder interaction for new housing ▪ Plan evaluation procedures ▪ Data collection, including photographic documentation requirements for new housing ▪ HOT2000 modeling for new houses ▪ Developing energy-efficient upgrade recommendations for new houses ▪ Preparation of homeowner/builder reports ▪ Quality assurance procedures for new houses ▪ ENERGY STAR for New Homes administrative and technical procedures
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Category 3 - R-2000

- o This type of training is intended for prospective R-2000 plan evaluators, inspectors and airtightness testers. This advanced training covers the topics listed above as well as the detailed R-2000 technical and administrative procedures related to the plan evaluation, inspection and airtightness testing of R-2000 homes.



Category 4 - Multi-Unit Residential Buildings (MURB) and Mixed-Use Buildings (MUB)

- This type of training is intended for prospective MURB/MUB energy advisors who have received energy advisor certification for any of NRCan's energy-efficient housing initiatives. It covers topics such as:
 - Eligibility and pre-screening
 - Preparation for onsite evaluation and client interaction
 - Data collection, including photographic documentation requirements
 - Blower door testing and air leakage identification
 - HOT2000 modeling
 - Advanced geometry calculations
 - Developing energy-efficient upgrade recommendations for new or existing buildings
 - Preparation of client reports
 - Reporting evaluation results
 - Quality assurance procedures

Workshops will be held across Canada, including in remote or aboriginal communities. The majority of the workshops will be delivered in English but some will also be delivered in French. The workshops will be delivered to stakeholders who are interested in delivering OEE's energy efficiency housing initiatives. The workshops, which are technical in nature, will cover aspects related specifically to NRCan's housing initiatives.

The number of participants for each workshop can vary depending on the subject matter and the audience. Workshop class size is usually limited to ten (10) participants or less. Depending on the type of workshop and the number of students, two Instructors may be required. Workshops can also be delivered via a mentoring process that usually has one (1) participant.

The length of each of the workshops (number of days) can vary depending on the target audience, the number of participants, their level of knowledge and experience, and the learning objectives of the specific workshop to be delivered. The length of the workshop will be confirmed by the Project Authority in the Call-up.

Some of the workshops can be combined and delivered as one workshop, depending on the requirements of the participants and the training location. In these cases, the Project Authority will indicate in the Call-up which workshops are to be combined and the total number of days required for the training.

SW5.1 Residential Energy Efficiency Initiatives and Workshop Descriptions

The following examples of residential energy efficiency initiatives and their corresponding workshops provide an overview of the possible subjects and audiences that Instructors will be required to teach.

EnerGuide Rating System

NRCan uses the EnerGuide Rating System (ERS) to measure the energy efficiency of existing and newly built homes that are enrolled in its energy efficiency housing initiatives. The ERS encourages the energy efficiency improvements of existing homes and energy-efficient new home building by providing homeowners and homebuyers with an energy rating label that helps them to better understand and compare their home's energy efficiency

See Appendix A for a list of possible ERS workshops.

R-2000 Standard

The R-2000 Standard encourages the construction of energy-efficient houses that are environmentally friendly and healthy to live in. These homes are built by trained and licensed R-2000 builders and are



quality-assured by third-party professionals who confirm that they meet the R-2000 Standard's stringent energy efficiency and environmental requirements. To ensure that R-2000 homes remain significantly more energy efficient than a standard home, NRCan is revising the R-2000 Standard for the next generation of initiatives.

As such, SOs will require training for the implementation and ongoing delivery of the next generation R-2000 Standard. To accomplish this, the Instructor will train the SOs' proposed trainers on how to effectively teach and present R-2000 administrative and technical information, including:

- The R-2000 Standard
- R-2000 CEA roles and responsibilities
- R-2000 technical requirements and administrative procedures
- R-2000 energy evaluation and verification procedures for the building envelope and HVAC system components at the pre-drywall and final inspection stages
- On-site training, in a house to demonstrate data collection and verification procedures
- The use of required forms
- The use of the HOT2000 software or recognized modeling tools to model R-2000 homes, including entering house specifications, requirements for the various inputs, interpreting reports, and understanding special design considerations in more complex houses.

See Appendix A for a list of possible R-2000 workshops.

ENERGY STAR⁷ for New Homes

Homes that meet the ENERGY STAR qualification are among the "best in class" in terms of energy efficiency. To ensure that this high energy efficiency standard is maintained, NRCan is revising the ENERGY STAR for New Homes (ESNH) initiative for the next generation of initiatives.

As such, SOs will require training for the implementation and ongoing delivery of the next generation of ESNH initiative. To accomplish this, the Instructor will train the SOs' proposed trainers on how to effectively deliver ESNH administrative and technical information to their SO's staff and builders. The training may include (but is not limited to) the following topics:

- Use ESNH guidelines to perform third-party plan evaluations and inspections of houses
- Understand the roles and responsibilities of ESNH CEAs, NRCan, the SO and builders
- Abide by the technical specifications and administrative procedures of ESNH prescriptive and performance paths and the EnerGuide Rating Service
- Create house files
- Follow on-site evaluation procedures of completed houses
- Conduct a blower door test and validate compliance with ENERGY STAR requirements
- Apply policies and procedures for ESNH prescriptive and performance approaches
- Develop upgrade packages and provide advice to builders on improving the energy efficiency of their homes

See Attachment 1 to Annex "A" for a list of possible ESNH workshops.

SW6 Tasks

The Contractor must ensure that the Instructor will provide training services on an "as and when requested" basis, as described in the Call-up. The services include but are not limited to the following:

SW6.1 In-class workshops

Pre-workshop Tasks

- Communicate by e-mail with the NRCan Project Authority (PA) at least ten (10) working days prior to the commencement date of the workshops to:



- obtain the most up-to-date version of the PowerPoint training modules, Instructor guides and notes, student manual, and other relevant training and reference material
 - determine method and responsibility for providing materials to workshop participants
 - download from the NRCan web site the most recent training version of the HOT2000 software or recognized modeling tools and make a copy for the students that will be attending the training (if required for the workshop to be delivered);
 - confirm with the PA that the Instructor has access to the necessary equipment for on-site training if applicable (e.g. the blower door, if required); and
 - if requested in the TA, plan and organize on-site training such as making arrangements with the SO or the PA to find suitable houses.
- at least one working day prior to the commencement of the workshop, confirm by e-mail with the PA that all arrangements have been finalized;
 - plan and organize the training material so that it is suited for specific target audiences and purposes;
 - in the case of on-site training, contact appropriate contact-person responsible for the on-site facilities (e.g., house(s)) to confirm availability at specified time and date, and any other relevant information; and
 - advise the NRCan Project Authority by telephone of any problems that could affect course delivery

Workshop Tasks

On the day of the workshop before start of workshop

- verify that any hard copy training materials (student manuals, reference material and handouts) are at the workshop location and have been placed in the room where the workshop will be held, if applicable;
- verify that the room is set up as required (e.g. position of tables, appropriate signage for the workshop, room temperature, water, etc.);
- verify that any demonstration equipment is on display; and
- verify that all materials are ready for use (audio-visual equipment, flip charts, markers, extension cords, power bars, computers, writing pads, pens, pencils) with due regard for safety in handling and display;

During workshop

- greet and provide students with place cards;
- circulate and collect a student sign-in sheet (which is used to collect the student's name, company name, address, telephone and fax numbers, email address and signature) and ensure that all students complete and sign the sheet each day;
- verify that the training facility meets the needs of the students;
- cover all of the training material during the workshop;
- distribute to participants the most recent electronic version of the HOT2000 software or recognized modeling tools and any other relevant material, as required;
- answer questions from the students;
- administer and supervise exams and practicum sessions, if requested in TA;
- observe and grade practicum using practicum evaluation forms, as required (see Appendix B)
- distribute and collect the student workshop evaluation forms;
- ensure that the training room is locked or secured when left unattended and at the end of each day if equipment or personal belongings are left in the room;
- advise the NRCan Project Authority by telephone of any problems that could affect course delivery
- If listed in the TA, perform and demonstrate the complete energy evaluation procedure of a house(s) including the on-site data collection, the blower door tests and any add-on on-site procedures.



Post-workshop Tasks

Probationary field training

In addition to the workshop, the Instructor may be required to supervise on-site evaluation(s) with each student as part of their probationary field training. This includes:

- Accompanying the students during the complete evaluation process, including greeting the homeowner(s), the house preparation, the walk-through verification of the house, the blower door and the exhaust devices depressurization tests, and the return of the house to its original condition;
- Obtaining copies of and review all relevant documentation such as data collection forms, sketches, blueprints, geometry calculations, photos, release forms signed by the homeowners and reports prepared by the students for the houses that they have evaluated as part of their probationary field training (this includes a predetermined number of houses evaluated by the students under the Instructor's supervision and a predetermined number of houses that the students have evaluated on their own);
- Obtaining and reviewing all of the electronic house files prepared by the students for the houses that they have evaluated as part of their probationary field training (this includes a predetermined number of houses evaluated by the students under the Instructor's supervision and a predetermined number of houses that the students have evaluated on their own);
- Providing permission to the students to provide a draft version of the report to the homeowners (this is only done once the files are completed and found to be acceptable by the Instructor);
- Submitting all final electronic house files to NRCan's mailbot after they have been reviewed by the Instructor;
- Providing permission to students to submit the final reports and labels to homeowners once the files are accepted by the NRCan mailbot, and the participant is certified;
- Following up, if necessary, with the students on the status of their probationary field training and ensuring that it has been completed no longer than three (3) months following the workshop. In instances where students will not be completing their probationary training within three (3) months, inform the PA by e-mail in advance;
- Preparing monthly status reports for each student describing the progress and status of their probationary field training
- Ensuring that the items listed above have been properly prepared according to NRCan procedures and guidelines

General post-workshop tasks

- mark any exams administered (if paper based);
- provide completed sign-in sheets, course evaluation forms and practicum evaluation forms to the NRCan PA, along with any additional recommendations or comments regarding participant success
- report by email to the PA any issues concerning the content or quality of the training material provided by NRCan or any other aspect of the training.
- complete electronic house files for any houses evaluated during the workshop, if requested in the TA;
- prepare homeowner reports, including recommendations, and labels for any houses evaluated during the workshop, if requested in the TA;
- submit the reports and labels to the homeowners of any houses evaluated during the workshop.

SW6.2 Mentoring option

The Instructor may be required to provide mentoring services for proposed trainers who require training before the next scheduled in-class Train-the-Trainer (TTT) Workshop. The Instructor's tasks for the mentoring and supervision of proposed trainers include but are not limited to the following:



Pre-mentoring Tasks

- communicate with the proposed trainer to schedule mentoring session
- communicate by e-mail with the NRCan Project Authority (PA) at least ten (10) working days prior to the commencement date of the mentoring session to:
 - obtain the most up-to-date version of the PowerPoint training modules, Instructor guides and notes, student manual, and other relevant training and reference material
 - determine method and responsibility for providing materials to proposed trainer
 - download from the NRCan web site the most recent training version of the HOT2000 software or recognized modeling tools and make a copy for the proposed trainer;
 - confirm with the PA that the Instructor has access to the necessary equipment for on-site training if applicable (e.g. the blower door); and
 - if requested in the TA, plan and organize on-site training such as making arrangements with the SO or the PA to find suitable houses.
- at least one working day prior to the commencement of the mentoring session, confirm by e-mail with the PA that all arrangements have been finalized;
- plan and organize the training material so that the proposed trainer's background and knowledge is taken into consideration;
- advise the NRCan Project Authority by telephone of any problems that could affect delivery of the mentor process

Tasks During Mentoring Process

- Have an initial meeting with the proposed trainer to discuss the Instructor's guide, training tips and to review the module materials for the selected courses.
- Participate in the first two sessions (or more if necessary) of each workshop taught by the proposed trainer; co-teaching the first session if necessary and observing the second session.
 - The mentor will pose questions in order to assess how well the proposed trainer is able to address challenging issues that may arise during the training session.
 - If the proposed trainer is having difficulty conveying the information to the students, then the mentor should step in to ensure that students receive all of the required information.
 - The mentor uses the practicum evaluation form to assess both of the workshops that the proposed trainer delivers (see Appendix B)
- Provide advice and feedback (verbally and by email) to the proposed trainer
- Provide and supervise an exam, if listed in the TA,
- Distribute and collect a workshop evaluation form; and
- Inform NRCan when the students have successfully completed their certification process and recommend them for certification.

Probationary field training

- If listed in the TA, supervise on-site evaluation(s) with the proposed trainer, as part of the probationary field training. This includes accompanying the proposed trainer during the complete evaluations, such as greeting the homeowner(s), the house preparation, the walk-through verification of the house, the blower door and the exhaust devices depressurization tests, and the return of the house to its original condition. This includes:
- Accompanying the proposed trainer during the complete evaluation process, including greeting the homeowner(s), the house preparation, the walk-through verification of the house, the blower door and the exhaust devices depressurization tests, and the return of the house to its original condition;
- Obtaining copies of and review all relevant documentation such as data collection forms, sketches, blueprints, geometry calculations, photos, release forms signed by the homeowners and reports prepared by the proposed trainer for the houses that have been evaluated as part of their probationary field training (this includes a predetermined number of houses evaluated by the



proposed trainer under the Instructor's supervision and a predetermined number of houses that the proposed trainer has evaluated independently);

- Obtaining and reviewing all of the electronic house files prepared by the proposed trainer for the houses that have been evaluated as part of the probationary field training (this includes a predetermined number of houses evaluated by the proposed trainer under the Instructor's supervision and a predetermined number of houses that the students have evaluated independently);
- Providing permission to the proposed trainer to provide a draft version of the report to the homeowners (this is only done once the files are completed and found to be acceptable by the Instructor);
- Submitting all final electronic house files to NRCan's mailbot after they have been reviewed by the Instructor;
- Providing permission to the proposed trainer to submit the final reports and labels to homeowners; once the files are accepted by the NRCan mailbot, and the trainer is certified;
- Following up, if necessary, with the proposed trainer on the status of the probationary field training and ensuring that it has been completed no longer than three (3) months following the workshop. In instances where the proposed trainer will not be completing the probationary training within three (3) months, inform the PA by e-mail in advance;
- Preparing monthly status reports for each student describing the progress and status of the probationary field training
- Ensuring that the items listed above have been properly prepared according to NRCan procedures and guidelines

Post-mentoring Tasks

- mark any exams administered (if paper-based);
- provide completed workshop evaluation form and practicum evaluation form(s) to the NRCan PA along with a pass/fail recommendation
- report by email to the PA any issues concerning the content or quality of the training material provided by NRCan or any other aspect of the training.
- complete electronic house files for the houses evaluated during the mentoring, if requested in the TA;
- prepare homeowner reports, including recommendations, and labels for the houses evaluated during the mentoring, if requested in the TA;
- submit the reports and labels to the homeowners of the houses evaluated during the mentoring;

SW6.3 Other Related Training Services

The Instructor must provide other related training services on an *As* and when requested basis for NRCan's energy efficiency housing initiatives, as described in the Call-up. The services include but are not limited to the following:

- deliver workshops related to NRCan's housing initiatives, other than those described in this Statement of Work (SOW);
- provide post training services other than those described in this SOW, which can include the mentoring and/or supervision of students;
- develop and prepare new training material (can include PowerPoint training modules with speaking notes, Instructor manuals, student manuals, reference material, exams, etc.);
- revise or update existing training material (can include PowerPoint training modules with speaking notes, Instructor manuals, student manuals, reference material, exams, etc.);
- customize existing training material for specific target audiences or requirements; and
- develop, revise and provide advice on training and certification methodology and requirements and associated documentation related to OEE housing initiatives.



SW7 Equipment

The Contractor must provide the following items:

SW7.1 For the Delivery of Workshops

Computer System - Hardware & Software
<p><u>Operating System:</u></p> <ul style="list-style-type: none"> • Windows: Windows® XP (SP2, 32bit), or Vista® (32/64 Bit), or Windows 7® (32/64 Bit) or • Macintosh: Mac OS® X 10.5 or higher <p><i>Note: If using a Mac, you will have to install and run a licensed copy of Windows via Boot Camp 2.0 or later in order to run HOT2000, as HOT2000 is only supported by Windows.</i></p> <p><i>Boot Camp is a software utility included with Mac OS X 10.5 Leopard that allows you to run compatible versions of Microsoft Windows on an Intel-based Mac at native speeds. Other third-party alternatives are also available.</i></p>
<p><u>Memory:</u></p> <ul style="list-style-type: none"> • 2 GB of RAM
<p><u>Software:</u></p> <ul style="list-style-type: none"> • Microsoft Office® 2003 or later versions
<p><u>Removable Storage:</u></p> <p>USB drive capabilities</p>
<p>LCD Projector</p> <p>The LCD projector must meet or exceed the following specifications:</p> <ul style="list-style-type: none"> • Resolution: SVGA (800X600) or higher, must have the same resolution as the laptop • Display Type: LCD • Brightness: 1500 lumens or higher • Contrast: 1000:1 or higher

SW7.2 For On-Site Training and Supervision

Blower Door

Resources that are proposed to offer services under categories 2 to 4 are required to have access to a blower door and the additional materials listed below.

The Blower Door must meet or exceed the following specifications (note that required specifications may be subject to change):



Component	Specifications
Fan	<ul style="list-style-type: none"> • Variable speed control (solid-state control) • Must operate on 110 to 125 vac/60Hz supply • Minimum flow at maximum fan speed to be at least 2501 L/s (5300 CFM) at 50 Pa pressure difference • Must be able to both pressurize and depressurize the house • Calibration curves and test verification certificate must be included with each fan
Door Frame	<ul style="list-style-type: none"> • Width: adjustable from 81.3 cm to 99 cm (32 inches to 39 inches) to fit a wide variety of doors or a suitably close range • Height: adjustable from 129.5 cm to 221 cm (51 inches to 87 inches) or a suitably close range • Door frame edge seal: flexible gasket or inflatable edge seal • Door frame material: Rigid airtight frame (e.g., wood, aluminum) • Door frame cover: Door panel(s) made of airtight material
Pressure and fan flow gauges	<ul style="list-style-type: none"> • Digital pressure gauge for simultaneous or switchable display of pressure and airflow readings • Pressure gauge unit: Pa • Pressure range: 0 to 60 Pa (suggested for building pressure) • Measurement resolution: 0.1 Pa for digital micro-manometers • Gauge accuracy: ± 1.0 Pa for digital micro-manometers • Wind dampening should be built into pressure gauge or available as add-on • Calibration of pressure measurement as per CGSB Standard No. 149.10-M86 • Flow measurement unit L/s or CFM • Flow measurement resolution: 1/100 times the reading or better for digital micro-manometers • Flow accuracy: $\pm 5\%$ • Flow range: capable of measuring a minimum airflow of 30 L/s (63 CFM) within its operating range • Calibration of flow measurement as per CGSB Standard No. 149.10-M86
Calculation procedures	<ul style="list-style-type: none"> • Calculation software based on current calibration data for blower door selected to determine airtightness results. Data analysis procedure and reporting must meet requirements set in CGSB Standard No. 149.10-M86 • Calibration characteristics and technical manuals

SW7.3 Additional Materials (as appropriate)

- Name tag/identification card
- Overalls
- Protective gloves
- Half-mask respirator, fit-tested by a certified industrial hygienist, or disposable face mask (N100 rating or HEPA filter)
- Goggles
- Work boots
- Hard hat (to wear on construction site)
- Shoes to wear inside the house
- Equipment belt
- Clipboard with checklist, graph paper, notepad, pen, pencil and eraser



- Digital camera
- Compass (for directional orientation of the house)
- Flashlights (pen light and flashlight)
- A flexible mirror
- Knife (retractable utility)
- Tool kit: multi-driver set, hammer, pliers, needle-nose pliers and battery-operated drill
- Tape measure (preferably 10 metres or longer)
- Non-metal probe such as a plastic crochet hook (to check for insulation around electrical outlets)
- Smoke pencil, atomizer bottle, feathers with fluffy quills or other device (to detect air leakage locations)
- Ladder (2.7 metres with extension)
- Stud finder
- Masking tape
- Interior caulking and caulking gun (for attic hatch if caulking must be removed to gain access)
- Lighter or matches
- Thermometer
- Aluminum foil (to prevent pilot light on furnace and hot water heater from going out during the blower door test)
- Tissues and disposable moist towelettes
- Knitting needle (to measure insulation thickness in attic)
- Hygrometer (to measure moisture content/humidity of environmental air)
- Plastic garbage bag and duct tape (to use to prevent any ashes in the fireplace from spilling into the house during the depressurization test)
- Plastic tarp (to protect flooring when opening attic hatch)
- Electrical consumption monitor

SW8 Role of NRCan

NRCan's role is as follows:

- Provide the Contractor with an electronic copy of all of the required workshop training and/or reference material
- Provide the Contractor with a list of registered students and their organizational affiliation (student sign-in sheet) one (1) week in advance of each workshop;
- Make arrangements for house(s) or facilities for the on-site portion of the training (if applicable);
- Provide the Contractor with information on updates or changes related to NRCan's housing initiatives so that the Instructor can convey and incorporate this information during the delivery of training services for NRCan.
- To identify in the Call-up whether NRCan or the Contractor will be responsible for:
 - Ensuring workshop logistics are arranged, including space and equipment rental (projection screen, flip charts, markers, extension cords and power bars, pens, pencils and writing pads), signage, etc.;
 - Ensuring that workshop participants have received all required electronic documentation such as student manuals, relevant reference material, data collection forms, participant evaluation forms;
 - Making arrangements for transportation for the Instructor and students to get to and from the location of the on-site training during the workshop (if applicable).
 - Shipping to the workshop location sufficient copies of all required hard copy documentation such as student manuals, relevant reference material, data collection forms, student sign-in sheets, participant evaluation forms and exams (if applicable); and/or
 - Providing other related training services described in section 5.3.

Some of the arrangements listed above may be made by a contracted organization, or regional SOs that provide services in support of NRCan's Housing Initiatives. In some cases, the Project Authority may ask the Contractor to communicate by telephone or email with the contracted organization or SO to confirm or obtain information on some of the logistical arrangements for the workshops. In these cases, the call-up will clearly identify the contact person



but the Project Authority will have the ultimate responsibility for authorization and approval of any tasks performed by the Instructor.

SW9 Intellectual Property

NRCan has ownership of all of the training materials and content. This applies to all material developed by the Contractor under the resulting call-ups against the Standing Offer and to material developed by NRCan. Any and all NRCan materials obtained by the Contractor shall remain the property of NRCan and shall not be reproduced in any way or disclosed to anyone without the prior written consent of NRCan. These materials include (without limitation): Instructor manuals, presentation materials such as PowerPoint presentations; and participant manuals, handouts, exams or other materials for participants.

SW10 Language

The Call-up will indicate whether services are required in English or French

SW11 Travel

Travel will be required to the location specified in the Call-up, if necessary.

SW12 Deliverables

SW12.1 Pre-Workshop Deliverables

Confirmation by email, at least five (5) working days prior to the commencement of the training, of any arrangements for on-site training made by the Contractor, when requested in the Call-up, providing details such as the specific location and a short description of the facilities/houses reserved for the training, as well as any equipment and transportation.

SW12.2 Post-Workshop Deliverables

The deliverables listed below must be provided by the Instructor to the PA within five (5) working days after the completion of the workshop, except if otherwise noted below or in the Call-up. Note that some of these deliverables may not be required, depending on the services to be provided.

- the signed participant sign-in sheets and completed course evaluation forms (if not completed electronically);
- originals of the marked student exams, if requested in the Call-up
- originals of the release forms signed by the homeowners for any houses evaluated during the workshop;
- hard copy or electronic version of completed data collection forms for any houses evaluated during the workshop;
- electronic version of house files (*.hse and *.tsv) of any houses evaluated during the workshop; the files must be submitted to the NRCan mailbot, using the Instructor number assigned by NRCan and must be accepted by the mailbot (within thirty (30) days of the on-site evaluations);
- hard copy or electronic versions of photos and the homeowner reports and EnerGuide labels for any houses evaluated during the workshop and confirmation by email that the reports and labels have been sent to the homeowners;
- monthly status reports by email for each student on the certification status of the students following the workshop (two (2) interim reports, one (1) month and two (2) months following the workshop, and one (1) final report, three (3) months following the workshop); the reports must include information on the number of house files completed and the house file numbers, the anticipated completion date of the probationary training, weaknesses of the students and an explanation for any probationary training that will not be completed by the students, if applicable;



- electronic version (*.hse and *.tsv) of the students' required number of house files completed as part of their certification; the files must be submitted to the NRCan mailbot once the students have successfully completed their certification, using the students' numbers assigned by NRCan, and must be accepted by the mailbot;
- confirmation by email of the successful completion of the probationary training of the students, within five (5) working days of the completion, including a recommendation on behalf of the Instructor for the student to become a recognized trainer/energy advisor; and
- report, by email, of any issues concerning the content or quality of the training material provided by NRCan.

SW12.3 Deliverables for Other Related Training Services

The deliverables for Other Related Training Services, as and when requested and as described in section 6.3 of this SOW, will vary depending on the services to be provided and will be specified in the Call-up.

SW13 Other Obligations

In the performance of the work, the Contractor and the Instructor must adhere to the following:

SW13.1 Code of Ethics

The Contractor and Instructor must adhere to the code(s) of ethics that is applicable to the relevant NRCan residential energy efficiency housing initiative when providing training services under this contract.

SW13.2 Constraints

The Contractor and Instructor:

- shall not recommend, promote or endorse specific products, distributors, retailers, contractors, manufacturers or other commercial entities to the trainees or participants;
- shall not specify the trade names of products (the Contractor and Instructor shall only refer to types of products in a generic manner) to the trainees or participants;
- shall not present him or herself as an agent of the Crown or an employee of Natural Resources Canada;
- shall not disclose any personal or corporate information to other parties that the Contractor or Instructor may have been privy to during the course of work performed under this standing offer;
- shall not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest between the Contractor's or Instructor's duties to that third party and the Contractor's or Instructor's duties under this standing offer; and
- shall not use or disclose the personal information of a homeowner, workshop participant or mentee, to any third party, including another business unit within the service organization, without prior informed and written consent. The Contractor and Instructor shall comply with the requirements of the *Personal Information Protection and Electronic Documents Act*.

SW13.3 Exclusion and Indemnification

- The Contractor and Instructor shall indemnify and save harmless NRCan and its Minister, officers, employees and agents from and against any claim, demand or action, irrespective of the nature of the cause of the claim, demand or action, alleging loss costs, expenses, damages or injuries (including injuries resulting in death) arising out of the Contractor's or Instructor's use of NRCan's administrative and technical procedures or otherwise as a result of the duties performed by the Contractor or Instructor under this Statement of Work or eventual Call-up, except to the extent caused by a breach of duty of Canada, or its Ministers, officers, employees, or agents.
- NRCan shall not be liable in respect of any claim, demand or action, irrespective of the nature of the cause of the claim, demand or action alleging any loss, injury or damages direct or indirect, which may result from the Contractor's or Instructor's use of NRCan's administrative and technical procedures or otherwise as a result of the duties performed by the Contractor or Instructor under this Statement of Work or eventual Call-up.



SW13.4 Orientation Session

The Contractor or Instructor may be invited to attend a meeting or webinar organized by NRCan, following award of contract, at which time detailed information will be provided about the various NRCan initiatives and workshops. Copies of the PowerPoint training modules, instructor guides, notes, workshop material, the HOT2000 software or recognized modeling tools and relevant technical and administrative reference material will also be provided.

SW13.5 Update Sessions

The Contractor or Instructor may also be required to attend additional information sessions for the purposes of providing updates to the various NRCan workshops on an annual basis or as required. In some cases, NRCan may send the update information to the Contractor and under some circumstances an update session may not be required.

The Contractor shall be reimbursed for travel and living expenses incurred by the Contractor or Instructor to attend these information sessions (as per standard government rates) but any other costs are the responsibility of the Contractor.

SW13.6 Equipment and Software Maintenance

- When providing services for which the energy evaluation software is required, the Instructor must use the most recent version provided by NRCan. This includes upgrading all of its workstations (in central office as well as in the field, if applicable) within 30 days of a new software upgrade release and abide by all the conditions applied to the processing of older files with more current versions of the software, if applicable.
- The Contractor must ensure that the blower door equipment described in section 7.2 is in proper operating condition in accordance with Canadian General Standards Boards (CGSB) standard CAN/CGSB 149.10-M86, "Determination of the Airtightness of Building Envelopes by Fan Depressurisation Method" and has been serviced and periodically calibrated as required.

SW13.7 Record Keeping

Contractors must ensure that all reports, photos, detailed sketches and calculations, electronic files and any program-specific documentation (e.g., receipts and invoices) produced or collected in the course of training delivery are kept for the duration of the standing offer plus two years, or three years from the date of an assessment, whichever is longer. This information can be stored as hard copies or electronic documents as appropriate and shall be made available to NRCan (or to any authorized person) upon request.

SW13.8 Maintenance of Training Material

The Instructor shall perform the work in accordance with the protocols and procedures associated with the respective housing initiative or program. NRCan will notify the Contractor, in writing, of any applicable amendments to the protocols and procedures via program notifications that are distributed through email. The Instructor must update the training material to reflect all applicable amendments. Updates to training material must be approved by NRCan before delivering training

SW13.9 NRCan-approved Instructor List

Successful Bidders will be awarded a multi-year standing offer under which call-ups will be initiated.

In addition, names of successful Bidders will be provided to NRCan stakeholders (e.g., service organizations that have a license agreement to deliver NRCan's housing initiatives). These stakeholders may initiate service requests directly with the Bidders. Under these circumstances, the terms of this standing offer will not apply. The terms of the arrangement will be negotiated by both parties, without NRCan's involvement.



ATTACHMENT 1 TO ANNEX "A": WORKSHOP CHART

The following lists of workshops are examples only. The actual requirements may change as policy decisions and requirements evolve.

EnerGuide Rating System Workshops			
Training Type	Workshop Name	Objective	Audience
<p>Train-the-Trainer</p> <p>Training that qualifies previous and new trainers to teach the next generation EnerGuide Rating System</p>	<p>TTT: Understanding the Next Generation ERS and Training Approach</p>	<p>Successful completion of this session will inform trainers of the next generation ERS training approach, including: Overview of transition from previous ERS to next generation. Career path for trainers Training material Instructor aids Certification paths for workshop participants Training tools and best practices</p>	<p>All previous and new trainers</p>
<p>Training that prepares PPEAs and proposed participants to deliver the next gen. EnerGuide Rating System</p>	<p>Next Generation Upgrade Level 1 (for New Housing Energy Advisors) To teach new housing PPEAs aspects of existing homes required for delivering the next generation ERS.</p>	<p>Successful completion of this session will prepare new housing PPEAs to deliver the next generation ERS for both new and existing homes.</p>	<p>New housing PPEAs who deliver the EnerGuide Rating System</p>
	<p>Next Generation Upgrade Level 1 (for ecoENERGY Retrofit - Homes Energy Advisors) To teach existing housing PPEAs aspects of new housing that are necessary for delivering the next generation ERS.</p>	<p>Successful completion of this session will prepare existing housing PPEAs to deliver the next generation ERS for both new and existing homes.</p>	<p>Existing housing PPEAs</p>
	<p>Next Generation CEA To train PPEAs and proposed CEAs to become certified energy advisors for the next generation initiatives</p>	<p>Successful completion of this session will prepare PPEAs and proposed CEAs to become certified energy advisors for the next generation ERS</p>	<p>PPEAs and proposed CEAs for existing and/or new homes.</p>



EnerGuide Rating System Workshops

Training Type	Workshop Name	Objective	Audience
Training that prepares previous and new service organizations to deliver the next generation EnerGuide Rating System	Service Organization Orientation to Next Generation ERS	This session will provide previous and new service organizations with an overview of the required next generation ERS administrative and technical policies and procedures.	Previous and new service organizations who will be delivering the next generation ERS.
Training that prepares previous and new quality assurance specialists to deliver the next generation EnerGuide Rating System	Next Generation ERS Quality Assurance Workshop	This session will train previous and proposed quality assurance specialist on quality assurance procedures for next generation ERS	Previous and proposed quality assurance specialists Participants in this session would have successfully completed <i>Next Generation CEA</i> workshop (and all required prerequisites for that workshop)



R-2000 Workshops			
Training Type	Workshop Name	Objective	Audience
<p>Train-the-Trainer</p> <p>Training that qualifies previous and new trainers to teach the Next Generation R-2000 Standard</p>	<p>TTT: Understanding the Next Generation R-2000 Standard and Training Approach</p>	<p>Successful completion of this session will inform trainers of the Next Generation training approach for the R-2000 Standard, including:</p> <ul style="list-style-type: none"> • Overview of transition from previous R-2000 Standard to next generation. • Career path for trainers • Training material • Instructor aids • Certification paths for workshop participants • Training tools and best practices 	<p>All previous and new trainers</p>
<p>Training that prepares previous R-2000 standard service providers and proposed participants to deliver the next gen. R-2000 Standard</p>	<p>R-2000 Standard for CEAs</p> <p>To train previous R-2000 standard service providers and proposed next generation R-2000 CEAs to become certified energy advisors for the next generation R-2000 standard</p>	<p>Successful completion of this session will prepare previous R-2000 standard service providers and proposed next generation R-2000 CEAs to become certified energy advisors for the next generation R-2000 standard</p>	<p>Previous R-2000 standard service providers and proposed R-2000 CEAs</p> <p>Participants in this session would have successfully completed <i>Next Generation ERS CEA</i> workshop (and all required prerequisites for that workshop)</p>
<p>Training that prepares previous and new service organizations to deliver the next generation R-2000 Standard</p>	<p>Service Organization Orientation to R-2000 Standard</p>	<p>This session will provide previous and new service organizations with an overview of the required R-2000 Standard administrative and technical policies and procedures.</p>	<p>Previous and new service organizations who will be delivering the R-2000 Standard.</p>
<p>Training that prepares previous and new quality assurance specialists to deliver the next generation R-2000 Standard</p>	<p>Quality assurance specialist training for the R-2000 Standard</p>	<p>This session will train previous and proposed quality assurance specialist on quality assurance procedures for the R-2000 Standard</p>	<p>Previous and proposed quality assurance specialists</p> <p>Participants in this session would have successfully completed <i>Next Generation ERS QA Workshop</i> (and all required prerequisites for that workshop)</p>



ENERGY STAR for New Homes Workshops

Training Type	Workshop Name	Objective	Audience
<p>Train-the-Trainer</p> <p>Training that qualifies previous and new trainers to teach the next generation ESNH initiative</p>	<p>TTT: Understanding the next generation ESNH and Training Approach</p>	<p>Successful completion of this session will inform trainers of the training approach for the next generation ESNH initiative, including:</p> <ul style="list-style-type: none"> • Overview of transition from previous ESNH to next generation ESNH. • Career path for trainers • Training material • Instructor aids • Certification paths for workshop participants • Training tools and best practices 	<p>All previous and new trainers</p>
<p>Training that prepares ESNH PPEAs and proposed participants to deliver the next generation ESNH initiative</p>	<p>ESNH CEA</p> <p>To train ESNH PPEAs and proposed next generation ESNH CEAs to become certified energy advisors for the next generation ESNH initiative</p>	<p>Successful completion of this session will prepare ESNH PPEAs and proposed next generation ESNH CEAs to become certified energy advisors for the next generation ESNH initiative</p>	<p>ESNH PPEAs and proposed next generation ESNH CEAs</p> <p>Participants in this session would have successfully completed <i>Next Generation ERS CEA</i> workshop (and all required prerequisites for that workshop)</p>
<p>Training that prepares previous and new service organizations to deliver the next generation ESNH initiative</p>	<p>Service Organization Orientation to Next Generation ESNH</p>	<p>This session will provide previous and new service organizations with an overview of the required Next Generation ESNH administrative and technical policies and procedures.</p>	<p>Previous and new service organizations who will be delivering the Next Generation ESNH.</p>



ENERGY STAR for New Homes Workshops

Training Type	Workshop Name	Objective	Audience
Training that prepares previous and new quality assurance specialists to deliver the next generation Next Generation ESNH	Quality assurance specialist training for the Next Generation ESNH	This session will train previous and proposed quality assurance specialist on quality assurance procedures for the Next Generation ESNH	Previous and proposed quality assurance specialists Participants in this session would have successfully completed <i>Next Generation ERS QA</i> workshop (and all required prerequisites for that workshop)



ATTACHMENT 2 TO ANNEX "A": PRACTICUM EVALUATION

Natural Resources Canada Train-the-Trainer Workshop

Practicum Evaluation

Name of Instructor: _____	Date: _____
Name of Proposed Trainer: _____	
Workshop Name: _____	

Circle a number to rate each of the following areas,

with 1 representing *Poor*, and 4 representing *Excellent*

Please rate the following:		Poor to Excellent			
1.	Ability to use concrete examples during the practicum	1	2	3	4
2.	Ability to communicate thoughts in a clear and organized manner	1	2	3	4
3.	Use of appropriate volume	1	2	3	4
4.	Effective use of body language	1	2	3	4
5.	Proposed trainer's ability to answer questions	1	2	3	4
6.	Ability to deliver information in a creative and interesting manner	1	2	3	4
7.	Level of comfort when interacting with audience	1	2	3	4
8.	Ability to tailor and deliver information so that it is relevant to the audience	1	2	3	4
9.	Demonstration of adequate preparation for practicum	1	2	3	4
10.	Knowledge of subject matter	1	2	3	4
11.	Ability to adequately cover material within the specified time period	1	2	3	4



Provide additional notes on the proposed trainer's strengths and weaknesses:

Empty box with horizontal lines for notes.

Based on the abilities demonstrated during this practicum session, I have observed that

_____ does G | does not G
(participant name)

I have the presentation skills required to be a trainer for Natural Resources Canada's

_____ initiative.
(insert initiative name)

Signed,

Train-the-Trainer Workshop Instructor/ Mentor

Date



ATTACHMENT 3 TO ANNEX "A": WORKSHOP CATEGORIES AND CORRESPONDING PROPOSAL EVALUATION APPROACH

Note: The Bidder may propose one (1) or multiple Resources. When proposing multiple Resources, the Bidder must submit a separate proposal for each Resource. Each Resource must meet all prerequisites for each category for which they are being proposed.

Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
Category 1 - Building Science and Energy-Efficient Housing	<ul style="list-style-type: none"> ▪ Builders ▪ Prospective program participants who require training or information sessions on building science and energy-efficient housing 	<ul style="list-style-type: none"> ▪ building science principles ▪ the house-as-a-system concept ▪ energy-efficient mechanical systems, ▪ energy-efficient construction/renovation practices and building materials ▪ air sealing ▪ indoor air quality, ventilation and combustion spillage ▪ renewable technologies 	<ul style="list-style-type: none"> ▪ Mandatory and Point-rated criteria for General Qualifications 	None. All compliant proposals will be evaluated for Category 1 - Building Science and Energy-Efficient Housing	Building Science and Energy-efficient Housing Exam
Category 2:	Prospective existing	Material covered in	<ul style="list-style-type: none"> ▪ Mandatory and 	The proposal must state that	Building Science



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
Specialization A - EnerGuide Rating System for Existing Homes	housing program participants such as energy advisors, service organizations, quality assurance specialists	Category 1 - Building Science and Energy-Efficient Housing, and topics such as: <ul style="list-style-type: none"> ▪ Blower door testing and air leakage identification ▪ Advanced geometry calculations ▪ Preparation for onsite evaluation and homeowner interaction for existing housing ▪ Data collection, including photographic documentation requirements for existing housing ▪ HOT2000 modeling for existing houses ▪ Developing energy-efficient upgrade recommendations for existing houses 	Point-rated criteria for General Qualifications Mandatory criteria for Category 2 - EnerGuide Rating <ul style="list-style-type: none"> ▪ Point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes 	the Resource is being proposed as a Category 2: Specialization A - EnerGuide Rating System for Existing Homes Instructor. The proposed Resource must meet the mandatory criteria and stated minimum point-rated criteria for General Qualifications	and Energy-efficient Housing Exam with module on EnerGuide Rating System for Existing Homes



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
		<ul style="list-style-type: none"> Preparation of homeowner reports Quality assurance procedures for existing houses 			
Category 2: Specialization B - EnerGuide Rating System for New Homes	Prospective new housing program participants such as energy advisors, service organizations, quality assurance specialists	Material covered in Category 1 - Building Science and Energy-Efficient Housing, and topics such as: <ul style="list-style-type: none"> Blower door testing and air leakage identification Advanced geometry calculations Preparation for onsite evaluation and homeowner/ builder interaction for new housing Plan evaluation procedures Data collection, 	<ul style="list-style-type: none"> Mandatory and Point-rated criteria for General Qualifications Mandatory criteria for Category 2 - EnerGuide Rating System Point-rated criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes 	The proposal must state that the Resource is being proposed as a Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes Instructor. The proposed Resource must meet the mandatory criteria and stated minimum point-rated criteria for General Qualifications	Building Science and Energy-efficient Housing Exam with module on EnerGuide Rating System for new homes



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
		including photographic documentation requirements for new housing <ul style="list-style-type: none"> ▪ HOT2000 modeling for new houses ▪ Developing energy-efficient upgrade recommendations for new houses ▪ Preparation of homeowner/builder reports ▪ Quality assurance procedures for new houses 			
Category 3 - R-2000	Prospective R-2000 plan evaluators, inspectors and airtightness testers	Material covered in: <ul style="list-style-type: none"> ▪ Category 1 - Building Science and Energy Efficient Housing ▪ Category 2: Specialization B - EnerGuide Rating System 	<ul style="list-style-type: none"> ▪ Mandatory and Point-rated criteria for General Qualifications ▪ Mandatory criteria for Category 2 - EnerGuide Rating 	The proposal must state that the Resource is being proposed as an R-2000 Instructor The proposal must state that the Resource is being proposed	Building Science Exam with module on EnerGuide Rating System for New Homes and ENERGY STAR for



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
		<p>for new homes and ENERGY STAR for New Homes</p> <p>Detailed R-2000 technical and administrative procedures related to the plan evaluation, inspection and airtightness testing of R-2000 homes.</p>	<p>System</p> <ul style="list-style-type: none"> Point-rated criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes Mandatory and Point-rated criteria for category 3 - R-2000 	<p>as a Category 2: Specialization A - EnerGuide Rating System for new homes and ENERGY STAR for New Homes Instructor.</p> <p>The proposed Resource must meet the Mandatory Evaluation Criteria for Category 2 - EnerGuide Rating System for New and Existing Homes and ENERGY STAR for New Homes and the Point-Rated Evaluation Criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes</p>	<p>New Homes and a module on R-2000</p>
Category 4 - Multi-Unit Residential and Mixed-Use Buildings	Prospective MURB/MUB energy advisors who have received energy advisor certification	<p>Topics related to multi-unit residential and mixed-use buildings such as:</p> <ul style="list-style-type: none"> Eligibility and pre- 	<ul style="list-style-type: none"> Mandatory and Point-rated criteria for General Qualifications Mandatory criteria 	<p>The proposal must state that the Resource is being proposed as a MURB/MUB Instructor</p> <p>The proposed Resource must</p>	<p>Building Science and Energy-efficient Housing Exam with a module on</p>



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
	for any of NRCan's energy-efficient housing initiatives	screening <ul style="list-style-type: none"> ▪ Data Collection ▪ Blower door testing and air leakage identification ▪ Onsite evaluation procedures and client interaction ▪ HOT2000 modeling ▪ Advanced geometry calculations ▪ Developing energy-efficient upgrade recommendations for new or existing buildings ▪ Preparation of client reports ▪ Reporting evaluation results ▪ Quality assurance procedures 	for Category 2 - EnerGuide Rating System <ul style="list-style-type: none"> ▪ Point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes AND/OR Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes ▪ Mandatory and Point-Rated Criteria for Category 4- Multi-Unit Residential Buildings (MURB) and Mixed-Use Buildings (MUB) 	meet the mandatory criteria for Category 2 - EnerGuide Rating System The proposed Resource must meet the minimum point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes AND/OR Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes Proposed resources who are found to be qualified under the point-rated criteria for Category 2: Specialization A - EnerGuide Rating System for Existing Homes and meet all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings will be	EnerGuide Rating System for New or Existing Homes and a module on MURBs/MUBs



Workshop Category			Evaluation of Proposed Instructor		
Category Name	Audience (Group to which the Instructor will provide training)	Workshop Topics	Evaluation Criteria (The evaluation grid is divided into five sections. This outlines which sections will be evaluated for each workshop category)	Prerequisites (Steps required in order for NRCan to evaluate proposed instructor for this category)	Exam (Only proposed Resources who meet the mandatory and minimum point-rated criteria are eligible to write the respective exams.)
				<p>eligible to provide services for existing Multi-Unit Residential and Mixed-Use Buildings.</p> <p>Proposed resources who are found to be qualified under the point-rated criteria for Category 2: Specialization B - EnerGuide Rating System for New Homes and ENERGY STAR for New Homes and meet all evaluation criteria for Category 4 - Multi-Unit Residential and Mixed-Use Buildings will be eligible to provide services for new Multi-Unit Residential and Mixed-Use Buildings.</p>	



ANNEX "B" - BASIS OF PAYMENT

1. Basis of Payment

1. Canada's total liability to the Contractor under the Contract (call-up) must not exceed \$ _____ (TBD in resulting call-ups), Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (a) when it is 75 percent committed, or
 - (b) four (4) months before the contract expiry date, or
 - (c) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

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

1.1 Professional Fees

The Contractor will be paid firm daily rates for the resource, for work performed in accordance with the Contract. Customs duties are included, and Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable.

Category and Name of Resource	Language Profile	List all Canadian cities where the Offeror would be prepared to work without being reimbursed for Travel & Living expense.	Estimated Level of Effort	Firm Daily Rate in CAD
_____	_____	_____	_____	\$ _____

Total Estimated Cost (a): \$ _____ (TBD in resulting call-up)



1.2 Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal, private vehicle and incidental expense allowances specified in Appendices B, C and D of the Treasury Board 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. Travel will only be authorized when not performed within the Canadian cities where the Offeror would be prepared to work without being reimbursed for Travel and Living expenses.

Canada will not accept any travel and living expenses for:

- a. Work performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. *The National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/eng/acts/N-4/> OR within 125kms of the NCR;

These expenses are included in the all-inclusive fixed time rates specified in section 1.1 above.

Estimated cost (b): \$_____ (TBD in resulting call-up)

Total Estimated Cost - Limitation of Expenditure (a + b): \$ _____ CAD (GST/HST extra)