

AMENDMENT No. 1

This amendment is raised to removed the DRAFT watermark from pages 12 to 51 of the English RFSO 1000164151.

SELECTION AND EVALUATION CRITERIA

1.0 Selection and Evaluation Methodology

- 1.1 Four (4) hard copies of the Bidder's Technical Proposal and one (1) hard copy of the Bidder's Financial Proposal, **MUST** be delivered to the specified address on or before the date and time as stipulated in the Letter of Invitation. Electronically transmitted bids will not be accepted.
- 1.2 Bidders **MUST** ensure that their Proposal provides sufficient evidence for DIAND to assess the compliance of the Proposal with the criteria listed in this Request for Proposal (RFP). It is the sole responsibility of Bidders to provide sufficient information within their Proposal to enable DIAND to complete its evaluation.
- 1.3 Bidders **MUST** include any reference material they wish to be considered for evaluation **within** their Proposal. Any material or documents outside the Proposal **will not** be considered; should a Bidder wish to provide screen shots of its website for evaluation, copies or printouts of website material **MUST** be included within the Proposal. URL links to the Bidder's website **will not** be considered by the DIAND Evaluation Committee.
- 1.4 To meet the requirements described herein, the experience of the Bidder **MUST** be work for which the Bidder provided services to clients exterior to the Bidder's own organization. Internal business development projects will not be accepted.
- 1.5 Experience gained during formal education **will not** be considered work experience. All requirements for work experience **MUST** have been obtained in a professional work environment as opposed to an educational setting. Co-op terms or other field work through a University or college that were conducted in conjunction with a professional firm are considered work experience provided they are related to the required services.
- 1.6 **Listing experience without providing any supporting information describing where, when and how such experience was obtained will result in the experience not being included for evaluation purposes.** Bidders are advised that the month(s) of individual Resource experience listed for a project in which the time frame overlaps that of another referenced project for the same named Resource will only be counted once. For example: Project #1 time frame is July 2008 to December 2008; Project #2 time frame is October 2008 to January 2009; the total months of experience for these two project references is seven (7) months.
- 1.7 **All requirements for experience to have been obtained within the last “#” years are interpreted in reference to the solicitation closing date.**
- 1.8 Selection and evaluation is based on a “rules of evidence” approach, such that the Bidder's Proposal is the sole demonstration of the Bidder's capacity to fulfill the requirement, as described within the RFP. No prior knowledge of or experience with the Bidder on the part of the DIAND Evaluation Committee will be taken into consideration.
- 1.9 **Each Proposal will be evaluated separately**, against the Mandatory Requirements and Point-Rated Criteria for the Work Stream(s) for which the Bidder has indicated it wishes to provide services. Within each Work Stream, the selection and evaluation process for the proposals consists of the following three (3) stages:
- Stage 1 -** Bidders will be evaluated on the Mandatory Requirements M1-M2.
- Stage 2 -** Bidders meeting ALL of M1-M2 will be evaluated on the basis of Point-Rated Criteria R1-R2.
- Stage 3 -** Bidders meeting an overall pass mark of 70% on each of the Point-Rated Criteria R1 and R2 will be evaluated on the basis of their Financial Proposal.
- Bidders failing to meet the requirements at any stage will be deemed to be non-compliant at that stage and will be given no further consideration.**

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1.10 DEFINITIONS

The following definitions apply to the Criteria below:

“**Must**” refers to a requirement. Failure on the part of the Bidder to provide the information or demonstrate it meets a requirement expressed by “**Must**” within its Proposal will result in the Proposal being deemed non-compliant and no further consideration will be given.

“**Should**” refers to a desired element. Failure on the part of the Bidder to provide the information requested by “**should**” within its proposal or to demonstrate that it meets the element expressed by “**should**” may result in the Bidder receiving less than full points on the Point-Rated Criteria. Bidders are encouraged to address elements expressed by “**should**”.

BIDDERS MAY PROPOSE AGAINST ANY OF THE FOLLOWING WORK STREAMS:

<p>1. Research and Policy Development Services—Economic Development Issues Facing Aboriginal Peoples in Canada</p>	<p>Conduct research, analysis, interviews, literature reviews, and document reviews; prepare policy and recommendation papers; provide strategic advice; and offer other forms of policy support as needed regarding issues related to Aboriginal economic development in Canada.</p>
<p>2. Quantitative Analysis—Economic Development Issues Facing Aboriginal Peoples in Canada</p>	<p>Develop and collect indicators and conduct quantitative analysis and data-driven research design services regarding issues related to Aboriginal economic development in Canada. Products may include analytical reports and quantitative and/or economic analytic support as needed.</p>
<p>3. Meeting Design, Organization, and Facilitation—Economic Development Issues Facing Aboriginal Peoples in Canada</p>	<p>Design, prepare, organize, facilitate, and report on meetings and events with senior-level federal officials and with stakeholders and communities regarding issues related to Aboriginal economic development.</p>
<p>4. Writing and Communication Services—Economic Development Issues Facing Aboriginal Peoples in Canada</p>	<p>Provide communications advice to support the promotion of <i>Framework</i> implementation and progress; develop and implement communications strategies and plans; determine target audiences for increasing the effectiveness of messaging; conduct research, analysis, interviews, environmental scans, and other products as needed with the specific purpose of creating communications support materials. Products may include reports, discussion guides, success stories, web content, fact sheets, Power Point presentations, speaking points, social media-tailored content, and other forms of written material/products as needed. Other services may include developing creative communication and information products using a variety of tools, techniques, and media, and selecting an appropriate medium to convey information, ideas, and results.</p>

Bidders MUST clearly identify within their Proposal which Work Stream(s) they are proposing against. To facilitate the evaluation process, for each Work Stream that is being proposed against, the Bidder must submit a separate proposal.

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Mandatory Criteria

Work Stream 1: Research and Policy Development Services—Economic Development Issues Facing Aboriginal Peoples in Canada.

Bidder proposals **MUST** meet **ALL** of the mandatory requirements of the work stream to be considered for further evaluation. Failure of a Bidder to meet any one (1) or more of the mandatory requirements will result in the proposal being deemed non-compliant, with the proposal being given no further consideration for the work stream.

WORK STREAM 1 - MANDATORY CRITERIA #1	MET	NOT MET
<p>M1 Qualifications of Resources</p> <p>The Bidder must propose at least one (1) resource and no more than five (5). For each resource named, detailed cover letters and curriculum vitae (CV) must be provided.</p> <p><i>Cover letters may elaborate on details provided in CVs; proposed resources must demonstrate that they meet ALL of the following minimum requirements:</i></p> <ul style="list-style-type: none"> • Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a related field (resources must always have a degree, but the specialization does not necessarily have to be acquired as part of a degree program. The specialization may also be obtained through an acceptable combination of education/course, training and/or experience. A justification must be provided in order to show how the specialization enables resource to contribute to Aboriginal economic development research). Proof of education in the form of a photocopy of degree(s) must be included in the proposal. • Experience working with Aboriginal organizations and/or communities. • Experience undertaking at least three (3) projects specifically on Aboriginal economic development—research, analysis, policy development, evaluation, performance research, program development or review, legislative review, capital markets advice related to economic development policy and/or programs, and assessment services related to issues pertinent to Aboriginal peoples in Canada—in which the resource was responsible for undertaking at least one (1) of the following types of activities per project: <ul style="list-style-type: none"> – Research and analysis related to Aboriginal economic development, including on and off reserve contexts – Reviewing and assessing current models/best practices for supporting economic development efforts and providing recommendations on overall approaches to Aboriginal economic development – Identifying and recommending key policy tools for enhancing economic development opportunities on reserve – Assessing Aboriginal economic development policy options – Developing draft policy papers and/or strategies for enhancing economic development on and off reserve 		

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<ul style="list-style-type: none"> - Managing relationships with stakeholders and communities - Having a speaking role in colloquia, conferences, or symposia - Preparing policy and recommendation papers, strategies, and presentations on Aboriginal economic development - Preparing structured literature reviews, document reviews, interviews, structured interview protocols, reports, papers, case studies, or trend analyses to support decision-making relevant to policy or program delivery - Preparing legislative reviews, program reviews, evaluation reports related to policy or program delivery, or capital market advice related to policy or program delivery - Developing and/or delivering presentations to support decision-making relevant to policy or program delivery <ul style="list-style-type: none"> • Development of at least two of the following six categories of products: <ul style="list-style-type: none"> - Reports, papers, studies, strategies, or presentations that have been developed for senior levels of Government and/or that have influenced Government policy - Reports, papers, studies, strategies or presentations that have been developed in a policy context for a public audience - Reports, papers, studies, strategies, or presentations that have been developed for Aboriginal communities or organizations - Peer-reviewed books or articles specifically on Aboriginal economic development policy and research - Research monographs published in books or journals that, while not necessarily peer-reviewed, have at minimum been edited by individuals with a recognized knowledge of Aboriginal issues. - Presentations accepted for delivery at conferences <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource’s knowledge and experience.</p> <p>CVs and cover letters should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. On CVs, all formal training should be listed chronologically; the title of the course or program and duration in days, months, or years should be included.</p> <p><i>CVs and cover letters will be used to evaluate resources against Mandatory M1 AND Point-Rated Criteria R1.</i></p>		
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WORK STREAM 1 - MANDATORY CRITERIA #2	MET	NOT MET
<p>M2 Resource Project Summaries, Project Sample & References</p> <p>M2.1 For two (2) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resource’s experience in successfully providing Aboriginal economic development research and analysis as described in Appendix D, Statement of Work, during the past five (5) years (dates calculated based on the closing date of the RFP).</p> <p>For one (1) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide a complete sample of the project results—this must include a sample of the Resource’s professional writing.</p> <p>Within each project summary and project sample provided, the Bidder MUST indicate (a-g):</p> <ul style="list-style-type: none"> a) Name/brief description of the client organization b) Dates/duration (in years/months) of the project c) Total resource level of effort (in days) for the duration of the project d) Description of the services provided by the resource during the project, including roles and responsibilities in relation to the project e) Brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource f) Extent to which the project finished on time, on budget, and in accordance with the established project goals g) Name, title, e-mail address and telephone number of the client project authority <p>The Bidder MUST use Table M2.1—Resource Project Summary Form—for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M2.1 as required.</p> <p>M2.2 The Bidder must include within its Proposal a signed reference letter for each of the project summaries (using template, Table M2.2).</p> <p>The reference must be able to confirm the Resource’s competencies in conducting research and policy analysis services on Aboriginal economic development issues. The reference letter/template must be from an individual or a firm outside of the Bidder’s organization and not from immediate relatives.</p> <p><i>Project summaries and samples, and references, will be used to evaluate resources against Mandatory Criteria M2 AND Point-Rated Criteria R1.2-1.4 and R2.</i></p>		

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Table M2.1—Resource Project Summary Form: Template submitted **MUST** contain the information required in **Mandatory Requirement M2 (a-g)** at a minimum.

Work Stream 1: Research and Policy Development Services—Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder Name:		Project Name:	
Resource Name:			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			
Project objectives, scope, needs and issues [e]			
Extent and Role of the Resource’s involvement in the Assignment, including project outcome and results [f]			
Client Project Authority Name, Title, E-mail address, Phone Number [g]			

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Resource Reference Form (Table M2.2)

Table M2.2—Proposed Resource Reference Form (Table M2.2): may provide additional detail as necessary; however template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 1: Research and Policy Development Services—Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information :	Email: _____ Telephone: () - _____		
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria			Yes
			No
1. Was the Resource primarily responsible for the...			
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors :			
a) Completed the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possess and demonstrate the following abilities :			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex issues related to Aboriginal economic development.			
d) The ability to provide quality and complete deliverables.			
e) Completed product(s) adequate to inform your policy and research goals.			
f) Delivered final products that did not require methodological, organizational, or subject-matter-expert intervention on your end.			
g) Delivered final products free from errors or structural issues requiring editorial intervention on your end.			
h) Delivered final products of a quality you would define as excellent.			
i) Worked with you to meet your needs in a professional manner that you would define as excellent.			
4. Would you retain the services of this Resource again?			
5. As the “Referrer” providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.			
Signature : _____ Date: _____			

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Point-Rated Criteria

Work Stream 1: Research and Policy Development Services—Economic Development Issues Facing Aboriginal Peoples in Canada

R1 Resource Qualifications and Experience		
The evidence within the cover letters, CV(s), project summaries, and project sample (including writing sample) for the Bidder’s proposed Resource(s), submitted in response to Mandatory Requirements M1 and M2 , will be evaluated on the breadth of the individual’s expertise regarding the provision of research and policy development services related to Aboriginal economic development, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors
R1.1 Educational attainment	/5	5 points for a Master’s degree or a PhD. Either degree must be from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a field relevant to contributing to Aboriginal economic development research. Proof of education in the form of a photocopy of degree(s) must be included in the proposal.
R1.2 Experience in carrying out research and analysis activities related to Aboriginal economic development in Canada.	/20	Two (2) points will be allocated per type of the following activities undertaken in the project summaries and project sample: <ul style="list-style-type: none"> • Research and analysis related to Aboriginal economic development, including on and off reserve contexts • Reviewing and assessing current models/best practices for supporting economic development efforts and providing recommendations on overall approaches to Aboriginal economic development • Identifying and recommending key policy tools for enhancing economic development opportunities on reserve • Assessing Aboriginal economic development policy options • Developing draft policy papers and/or strategies for enhancing economic development on and off reserve • Managing relationships with stakeholders and communities • Having a speaking role in colloquia, conferences, or symposia • Preparing policy and recommendation papers, strategies, and presentations on Aboriginal economic development • Preparing structured literature reviews, document reviews, interviews, structured interview protocols, reports, papers, case

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		<p>studies, or trend analyses to support decision-making relevant to policy or program delivery</p> <ul style="list-style-type: none"> • Preparing legislative reviews, program reviews, evaluation reports related to policy or program delivery, or capital market advice related to policy or program delivery • Developing and/or delivering presentations to support decision-making relevant to policy or program delivery <p>Up to 20 points.</p>
<p>R1.3 Experience in carrying out research and analysis activities on specific themes relevant to Aboriginal economic development in Canada.</p>	<p>/15</p>	<p>Three (3) points will be allocated per theme addressed in the project summaries and project sample:</p> <ul style="list-style-type: none"> - Identification of <i>Indian Act</i> barriers - Legislative solutions to <i>Indian Act</i> barriers -The modern treaty environment -Institutional development and mature jurisdictional relationships -Opt-in legislative regimes -Modern land management -Aboriginal participation in major resource projects -Financial participation -Access to capital -Aboriginal business development and readiness -Community opportunity readiness -Skills, training, and education -Aboriginal youth -Aboriginal women -Métis-relevant policies and programs -First Nations-relevant policies and programs -Inuit-relevant policies and programs -The North <p>Up to 15 points.</p>
<p>R1.4 Evaluation of professional writing sample.</p>	<p>/15</p> <p>15 pts = Excellent</p> <p>12 pts = Acceptable</p> <p>9 pts = Below expectations</p>	<p>The professional writing sample will be evaluated based on clarity, grammar, precision, organization of thoughts, depth and breadth of knowledge, and the level of analytical and methodological sophistication demonstrated.</p> <p>The following scale will be used to evaluate each sample.</p>

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	0 pts= Poor	<p>Excellent: Very complete, relevant, and clear: neat, logical and easy to follow; precise and correct references; grammatically sound; sophisticated analysis and methodology.</p> <p>Acceptable: Relatively complete, relevant, and clear: fairly neat, logical and easy to follow; rather precise and generally correct references; basically grammatically sound; somewhat sophisticated analysis and methodology.</p> <p>Below expectations: More or less complete, relevant, and clear: more or less neat, logical and easy to follow; some imprecision; some problems with references; some grammatical mistakes; lacking in sophistication analytically and methodologically.</p> <p>Poor: Incomplete, irrelevant, and unclear: lacking neatness, logic, and organization; imprecise; lacking grammatical solidity; unsophisticated analysis and methodology.</p> <p>Up to 15 points.</p>
R1. Minimum pass-mark of 70%		39/55
<p>R2 Resource References The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2 will be evaluated on the quality of the individual’s reference in regards to the provision of research and policy development services related to Aboriginal economic development, as defined in the Statement of Work. DIAND reserves the right to contact the named Reference for the purpose of verifying the accuracy and veracity of the information provided in M2.2"</p>		
R2.1 Reference #1	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.2 Reference #2	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project</p>

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		<p>manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.3 Reference #3	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2. Minimum pass-mark of 70%	42 /60	
Total	/115	

Where the Bidder proposes multiple resources, the average score of the acceptable resources will determine the Bidder’s rating score.

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements.

Only resources that achieve a pass-mark of 70% on each point-rated criteria **R1 and R2** will be considered for selection on the basis of their financial proposal.

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Mandatory Criteria

Work Stream 2: Quantitative Analysis—Economic Development Issues Facing Aboriginal Peoples in Canada

Bidders’ proposals MUST meet ALL of the Mandatory Requirements of this work stream in order for their proposals to be considered for further evaluation. Failure on the part of the Bidder to meet any one (1) or more of the Mandatory Requirements will result in the proposal being deemed non-compliant, with the proposal being given no further consideration for the work stream:

WORK STREAM 2 - MANDATORY CRITERIA #1	MET	NOT MET
<p>M1 Qualifications of Resources</p> <p>The Bidder must propose one (1) resource and no more than five (5). For each resource named, detailed cover letters and curriculum vitae (CV) must be provided.</p> <p><i>Cover letters may elaborate on details provided in CVs; proposed resources must demonstrate that they meet ALL of the following minimum requirements:</i></p> <ul style="list-style-type: none"> • Graduation with a degree from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a related field (resources must always have a degree, but the specialization does not necessarily have to be acquired as part of a degree program. The specialization may also be obtained through an acceptable combination of education/course, training and/or experience. A justification must be provided in order to show how the specialization enables resource to contribute to Aboriginal economic development research). Proof of education in the form of a photocopy of degree(s) must be included in the proposal. • Experience working with Aboriginal organizations and/or communities. • Experience conducting economic and/or statistical analysis. • Experience undertaking at least three (3) projects specifically on Aboriginal economic development—analysis of data corresponding to the economic development of Aboriginal peoples in Canada—in which the resource was responsible for undertaking at least one (1) of the following types of activities per project: <ul style="list-style-type: none"> – Identifying, collecting, assessing, interpreting, and analyzing data related to Aboriginal economic development (for example, economic data and financial analysis including but not limited to the comparative value of a dollar on and off reserve; the economic impact of urban additions to reserve on municipalities; and income inequality) – Formulating recommendations based on research/analysis findings, including but not limited to reports based on analysis of capital market data to support advice on policy or program delivery – Preparing written summary reports, evaluation reports, and quantitative analysis papers, including but not limited to papers on trend analysis, statistical models, and economic outcomes. 		

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<ul style="list-style-type: none"> - Designing quantitative analysis methodologies - Developing products arising from research/analysis findings in multiple media, including but not limited to graphs, charts, reports, PowerPoint presentations, interactive databases/systems, and data-enriched maps <ul style="list-style-type: none"> • Development of one each of at least three of the following eight categories of products: <ul style="list-style-type: none"> - Graphic representations of data, including but not limited to databases or maps depicting multiple social, demographic, and economic indicators of interest to Aboriginal peoples and communities - Reports, papers, studies, strategies, or presentations that have been developed for senior levels of Government and/or influenced Government policy - Reports, papers, studies, strategies, or presentations that have been developed in a policy context for a public audience - Reports, papers, studies, strategies, or presentations that have been developed for Aboriginal communities or organizations - Peer-reviewed books or articles specifically on Aboriginal economic development policy and research - Research monographs published in books or journals that, while not necessarily peer-reviewed, have at minimum been edited by individuals with a recognized knowledge of Aboriginal issues - Presentations accepted for delivery at conferences - Performance measurements or benchmarking reports, including the development of indicators <p>Relevant work experience should be listed chronologically, with a brief description of the nature of the work that indicates the depth of the resource’s knowledge and experience.</p> <p>CVs and cover letters should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. On CVs, all formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p><i>CVs and cover letters will be used to evaluate resources against Mandatory MI AND Point-Rated Criteria R1.</i></p>		
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WORK STREAM 2 - MANDATORY CRITERIA #2	MET	NOT MET
<p>M2 Resource Project Summaries, Project Sample & References</p> <p>M2.1 For two (2) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed Resource’s experience in successfully providing Aboriginal economic development research and analysis as described in Appendix D, Statement of Work, during the past five (5) years (dates calculated on the closing date of the RFP).</p> <p>For one (1) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide a complete sample of the project results—this must include a sample of the Resource’s professional analysis and writing.</p> <p>Within each project summary and project sample provided, the Bidder MUST indicate (a-g):</p> <ul style="list-style-type: none"> a) Name/brief description of the client organization b) Dates/duration (in years/months) of the project c) Total resource level of effort (in days) for the duration of the project d) Description of the services provided by the resource during the project, including roles and responsibilities in relation to the project e) Brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource f) Extent to which the project finished on time, on budget, and in accordance with the established project goals g) Name, title, e-mail address and telephone number of the client project authority <p>The Bidder MUST use Table M2.1—Resource Project Summary Form—for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M2.1 as required.</p> <p>M2.2 The Bidder must include within its Proposal, a signed reference letters for each of the project summaries (using template, table M2.2).</p> <p>The reference must be able to confirm the Resource’s competencies in conducting quantitative analysis on Aboriginal economic development issues The reference letter/template must be from an individual or a firm outside of the Bidder’s organization and not from immediate relatives.</p> <p><i>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point-Rated Criteria R1.2-1.4 and R2.</i></p>		

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Resource Project Summary Form

Table M2.1—Resource Project Summary Form: Template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 2: Quantitative Analysis—Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder Name:		Project Name:	
Resource Name:			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			
Project objectives, scope, needs and issues [e]			
Extent and Role of the Resource’s involvement in the Assignment, including project outcome and results [f]			
Client Project Authority Name, Title, E-mail address, Phone Number [g]			

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Resource Reference Form (Table M2.2)

Table M2.2—Proposed Bidder Reference Form: may provide additional detail as necessary; however template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 2: Quantitative Analysis—Economic Development Issues Facing Aboriginal Peoples in Canada				
Bidder name :				
Resource name :				
Reference name, title and organization :				
Reference contact information :	Email: _____ Telephone: () - _____			
Project Name and Scope of work accomplished for the reference :				
Services provided by the Resource during the project				
Reference Criteria			Yes	No
1. Was the Resource primarily responsible for the...				
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()	
2. Did the Resource meet the following critical factors :				
a) Completed the project on time.				
b) Stayed within budget.				
c) Met all the project objectives.				
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).				
3. Did the Resource possess and demonstrate the following abilities :				
a) The ability to develop sound methodologies.				
b) The ability to coordinate multiple tasks.				
c) The ability to understand and analyze complex issues related to Aboriginal economic development.				
d) The ability to provide quality and complete deliverables.				
e) Completed product(s) adequate to inform your policy and research goals.				
f) Delivered final products that did not require methodological, organizational, or subject-matter-expert intervention on your end.				
g) Delivered final products free from errors or structural issues requiring editorial intervention on your end.				
h) Delivered final products of a quality you would define as excellent.				
i) Worked with you to meet your needs in a professional manner that you would define as excellent.				
4. Would you retain the services of this Resource again?				
5. As the “Referrer” providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.				
Signature : _____ Date: _____				

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Point-Rated Criteria

Work Stream 2: Quantitative Analysis—Economic Development Issues Facing Aboriginal Peoples in Canada

R1 Resource Qualifications and Experience		
The evidence within the cover letters, CV(s), project summaries, and project sample (including writing sample) for the Bidder’s proposed Resource(s) submitted in response to Mandatory Requirements M1 and M2 will be evaluated on the breadth of the individual’s expertise regarding the provision of quantitative analysis services related to Aboriginal economic development, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/5	5 points for a Master’s degree or a PhD. Either degree must be from a recognized university with acceptable specialization in Economics, Social Sciences or Statistics, or a related field (a justification must be provided in order to show how the education attainment enables the resource to contribute to Aboriginal economic development research). Proof of education (a photocopy of the degree) must be included in the proposal.
R1.2 Experience in carrying out quantitative analysis and analytical activities related to Aboriginal economic development in Canada.	/20	Four (4) points will be allocated per type of the following activities undertaken in the three submitted examples of work experience: <ul style="list-style-type: none"> • Identifying, assessing, interpreting, and analyzing data related to Aboriginal economic development • Formulating recommendations based on research/analysis findings, including but not limited to reports based on analysis of capital market data to support advice on policy or program delivery • Preparing written summary reports and quantitative analysis papers • Designing quantitative analysis methodologies • Developing products arising from research/analysis findings in multiple media, including but not limited to graphs, charts, reports, PowerPoint presentations, interactive databases/systems, and data-enriched maps Up to 20 points.
R1.3 Experience in carrying out quantitative analysis and analytical activities on specific themes relevant to Aboriginal economic development in Canada.	/15	Three (3) points will be allocated per theme addressed in the project summaries and project sample: <ul style="list-style-type: none"> - <i>Indian Act</i> barriers - Legislative solutions to <i>Indian Act</i> barriers

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		<ul style="list-style-type: none"> -The modern treaty environment -Institutional development and mature jurisdictional relationships -Opt-in legislative regimes -Modern land management -Aboriginal participation in major resource projects -Financial participation -Access to capital -Aboriginal business development and readiness -Community opportunity readiness -Skills, training, and education -Aboriginal youth -Aboriginal women -Métis-relevant policies and programs -First Nations-relevant policies and programs -Inuit-relevant policies and programs -The North <p>Up to 15 points.</p>
<p>R1.4 Evaluation of professional writing sample.</p>	<p style="text-align: center;">/15</p> <p>15 pts = Excellent</p> <p>12 pts = Acceptable</p> <p>9 pts = Below expectations</p> <p>0 pts= Poor</p>	<p>The professional sample of work will be evaluated based on clarity, grammar, precision, organization of thoughts, depth and breadth of knowledge, and the level of analytical and methodological sophistication demonstrated.</p> <p>The following scale will be used to evaluate each sample.</p> <p>Excellent: Very complete, relevant, and clear: neat, logical and easy to follow; precise and correct references; grammatically sound; sophisticated analysis and methodology.</p> <p>Acceptable: Relatively complete, relevant, and clear: fairly neat, logical and easy to follow; rather precise and generally correct references; basically grammatically sound; somewhat sophisticated analysis and methodology.</p> <p>Below expectations: More or less complete, relevant, and clear: more or less neat, logical and easy to follow; some imprecision; some problems with references; some grammatical mistakes; lacking in sophistication analytically and methodologically.</p> <p>Poor: Incomplete, irrelevant, and unclear: lacking neatness, logic, and organization;</p>

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		imprecise; lacking grammatical solidity; unsophisticated analysis and methodology. Up to 15 points.
Minimum Pass Mark: 70%	39/55	
<p>R2 Resource References The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2 will be evaluated on the quality of the individual’s reference in regards to the provision of quantitative analysis services related to Aboriginal economic development, as defined in the Statement of Work.</p>		
R2.1 Reference #1	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One (1) point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.2 Reference #2	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.3 Reference #3	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answers for section 2 and 3 of the Resource Reference Form (Table M2.2).</p>

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		Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).
Minimum pass-mark	42/60	
Total	/115	

Where the Bidder proposes multiple resources, the average score of the acceptable resources will determine the Bidder’s rating score.

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements.

Only resources that achieve a pass-mark of 70% on each point-rated criteria **R1 and R2** will be considered for selection on the basis of their financial proposal.

Mandatory Criteria

Work Stream 3: Meeting Design, Organization, and Facilitation—Economic Development Issues Facing Aboriginal Peoples in Canada

Bidders’ proposals **MUST** meet **ALL** of the Mandatory Requirements of this work stream for their proposals to be considered for further evaluation. Failure on the part of the Bidder to meet any one (1) or more of the Mandatory Requirements will result in their proposal being deemed non-compliant, with the proposal being given no further consideration for the work stream:

WORK STREAM 3 - MANDATORY CRITERIA #1	MET	NOT MET
<p>M1 Qualifications of Resource</p> <p>The Bidder must propose one (1) Resource and no more than five (5). For each resource named, detailed cover letters and curriculum vitae (CV) must be provided.</p> <p><i>Cover letters may elaborate on details provided in CVs; proposed resources must demonstrate that they meet ALL of the following minimum requirements:</i></p> <ul style="list-style-type: none"> • Graduation with a degree or diploma from a recognized university or a recognized post-secondary educational institution with acceptable specialization in Communications, Public Affairs, Journalism, Economics, Social Sciences or Statistics, or a related field (resources must always have a degree or a diploma, but the specialization does not necessarily have to be acquired as part of a degree or diploma program. The specialization may also be obtained through an acceptable combination of education/course, training and/or professional experience. A justification must be provided in order to show how the specialization enables resource to contribute to Aboriginal economic development research). Proof of education in the form of a photocopy of degree(s) or diploma(s) must be included in the proposal. • Experience working with Aboriginal organizations or communities. 		

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<ul style="list-style-type: none"> • Experience undertaking at least three (3) projects specifically on Aboriginal economic development, in which the resource was responsible for undertaking at least one (1) of the following types of activities per project: <ul style="list-style-type: none"> - Designing, preparing, and organizing meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events with senior-level federal officials, or with stakeholders and communities, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites. - Designing, preparing, and organizing meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events in a policy context for a public audience, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites - Designing, preparing, and organizing meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events for Aboriginal communities or organizations, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites. - Preparing discussion papers and summary reports for such meetings and events as described above, including recommendations and next steps. - Managing relations with stakeholders and communities. <p>Relevant work experience should be listed chronologically, with a brief description of the services that indicate the depth of the resource’s knowledge and experience.</p> <p>CVs and cover letters should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. On CVs, all formal training should be listed chronologically; the title of the course or program and duration in days, months, or years should be included.</p> <p><i>CVs and cover letters will be used to evaluate resources against Mandatory M1 AND Point-Rated Criteria R1.</i></p>		
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WORK STREAM 3 - MANDATORY CRITERIA #2	MET	NOT MET
<p>M2 Resource Project Summaries, Project Sample & References</p> <p>M2.1 For two (2) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resource’s experience in successfully providing meeting design, organization, and facilitation on issues related to Aboriginal economic development, as described in Appendix D, Statement of Work, during the past five (5) years (dates calculated on the closing date of the RFP).</p> <p>For one (1) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide a complete sample of project results—this must include a sample of the Resource’s professional writing.</p> <p>Within each project summary and project sample provided, the Bidder MUST indicate (a-g):</p> <ul style="list-style-type: none"> a) Name/brief description of the client organization b) Dates/duration (in years/months) of the project c) Total resource level of effort (in days) for the duration of the project d) Description of the services provided by the resource during the project, including roles and responsibilities in relation to the project e) Brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource f) Extent to which the project finished on time, on budget, and in accordance with the established project goals g) Name, title, e-mail address and telephone number of the client project authority <p>The Bidder MUST use Table M2.1—Resource Project Summary Form—for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M2.1 as required.</p> <p>M2.2 The Bidder must include within its Proposal, a signed reference letters for each of the project summaries (using template, table M2.2).</p> <p>The reference must be able to confirm the Resource’s competencies in meeting design, organizations, and facilitation in the field of economic development issues facing Aboriginal peoples in Canada. The reference letter/template must be from an individual or a firm outside of the Bidder’s organization and not from immediate relatives.</p> <p><i>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point-Rated Criteria R1.2-1.4 and R2.</i></p>		

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Resource Project Summary Form

Table M2.1—Resource Project Summary Form: Template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 3: Meeting Design, Organization, and Facilitation Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder Name:		Project Name:	
Resource Name:			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			
Project objectives, scope, needs and issues [e]			
Extent and Role of the Resource’s involvement in the Assignment, including project outcome and results [f]			
Client Project Authority Name, Title, E-mail address, Phone Number [g]			

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Resource Reference Form (Table M2.2)

Table M2.2—Proposed Resource Reference Form (Table M2.2): may provide additional detail as necessary; however template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 3: Meeting Design, Organization, and Facilitation—Economic Development Issues Facing Aboriginal Peoples in Canada				
Bidder name :				
Resource name :				
Reference name, title and organization :				
Reference contact information :	Email: _____ Telephone: () - _____			
Project Name and Scope of work accomplished for the reference :				
Services provided by the Resource during the project				
Reference Criteria			Yes	No
1. Was the Resource primarily responsible for the...				
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()	
2. Did the Resource meet the following critical factors :				
a) Completed the project on time.				
b) Stayed within budget.				
c) Met all the project objectives.				
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).				
3. Did the Resource possess and demonstrate the following abilities :				
a) The ability to develop sound methodologies.				
b) The ability to coordinate multiple tasks.				
c) The ability to understand and analyze complex issues related to Aboriginal economic development.				
d) The ability to provide quality and complete deliverables.				
e) Completed product(s) adequate to inform your policy and research goals.				
f) Delivered final products that did not require methodological, organizational, or subject-matter-expert intervention on your end.				
g) Delivered final products free from errors or structural issues requiring editorial intervention on your end.				
h) Delivered final products of a quality you would define as excellent.				
i) Worked with you to meet your needs in a professional manner that you would define as excellent.				
4. Would you retain the services of this Resource again?				
5. As the “Referrer” providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.				
Signature : _____ Date: _____				

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Point-Rated Criteria

Work Stream 3: Meeting Design, Organization, and Facilitation—Economic Development Issues Facing Aboriginal Peoples in Canada

R1 Resource Qualifications		
The evidence within the cover letters, CV(s), project summaries, and project sample (including writing sample) for the Bidder’s proposed Resource(s) submitted in response to Mandatory Requirement M1 and M2 will be evaluated on the breadth of the individual’s expertise regarding meeting design, organization, and facilitation on issues related to Aboriginal economic development, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/5	5 points for formal educational achievement above and beyond a degree or diploma. Qualified achievements include a Master’s degree or a PhD and/or additional professional certificate or diploma. Degrees, diplomas, and certificates must be from a recognized university or a recognized post-secondary educational institution with acceptable specialization in Communications, Public Affairs, Journalism, Economics, Social Sciences or Statistics, or a related field (a justification must be provided in order to show how the education attainment enables the resource to contribute to Aboriginal economic development research). Proof of education (a photocopy of the degree, diploma, or certificate) must be included in the proposal.
R1.2 Experience in carrying out meeting design, organization, and facilitation services related to Aboriginal economic development in Canada.	/20	Four (4) points will be allocated per type of the following activities undertaken in the three submitted examples of work experience: <ul style="list-style-type: none"> - Designing, preparing, and organizing meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events with senior-level federal officials, or with stakeholders and communities, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites. - Designing, preparing, and organizing meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events in a policy context for a public audience, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites - Designing, preparing, and organizing

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		<p>meetings (including but not limited to round tables, conferences, colloquia, or symposia) and events for Aboriginal communities or organizations, including sending invitations, organizing RSVPs, and finding and coordinating meeting sites.</p> <ul style="list-style-type: none"> - Preparing discussion papers and summary reports for such meetings and events as described above, including recommendations and next steps. - Managing relations with stakeholders and communities. <p>Up to 20 points.</p>
<p>R1.3 Experience in carrying out meeting design, organization, and facilitation services on themes relevant to Aboriginal economic development.</p>	<p>/15</p>	<p>Three (3) points will be allocated per theme addressed in the project summaries and project sample:</p> <ul style="list-style-type: none"> - <i>Indian Act</i> barriers - Legislative solutions to <i>Indian Act</i> barriers -The modern treaty environment -Institutional development and mature jurisdictional relationships -Opt-in legislative regimes -Modern land management -Aboriginal participation in major resource projects -Financial participation -Access to capital -Aboriginal business development and readiness -Community opportunity readiness -Skills, training, and education -Aboriginal youth -Aboriginal women -Métis-relevant policies and programs -First Nations-relevant policies and programs -Inuit-relevant policies and programs -The North <p>Up to 15 points.</p>
<p>R1.4 Evaluation of project sample</p>	<p>/15</p> <p>15 pts = Excellent</p> <p>12 pts = Acceptable</p> <p>9 pts = Below expectations</p>	<p>The project sample will be evaluated based on demonstrated organizational capacity, stakeholder involvement, community involvement, and professional writing skills.</p> <p>Excellent: Demonstrates that the Bidder employed a well-established proactive and reactive project management approach that delivered quality, reliable, and efficient services, and that successfully countered risks</p>

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	<p>0 pts= Poor</p>	<p>and constraints involved in the work. Bidder also demonstrates one or more innovative approaches and/or methodologies employed in the project, including demonstration of successful application and outcome, benefits, considerations. The project demonstrates the way(s) in which the innovation(s) and associated benefits/considerations are relevant to DIAND and how they could be applicable to the context of this Request for Proposals.</p> <p>Acceptable: Demonstrates that the Bidder employed a reactive project management approach that delivered quality, reliable, and efficient services. Bidder also demonstrates one or more innovative approaches and/or methodologies employed in the project, including demonstration of some application/outcome, benefits, and considerations. The project demonstrates the ways in which the innovation(s) and associated benefits/considerations could be relevant to DIAND and how they could be applicable to the context of this Request for Proposals.</p> <p>Below Expectations: Demonstrates that the Bidder employed a project management approach in the work performed. Bidder does not fully demonstrate innovative approaches and/or methodologies employed in the project. Application/outcome, benefits, and considerations of the project and the project’s applicability to DIAND and to the context of this Request for Proposals are not fully addressed</p> <p>Poor: Does not demonstrate that a project management approach was employed. Bidder does not demonstrate innovation in approach and methodology that is relevant to DIAND’s requirements.</p> <p>Up to 15 points.</p>
<p>Minimum pass-mark of 70%</p>	<p>39 /55</p>	
<p>R2 Resource Reference The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual’s reference in regards to the provision of meeting design, organization, and facilitation on issues related to Aboriginal economic development, as</p>		

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defined in the Statement of Work.		
R2.1 Reference #1	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.2 Reference #2	/20	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
R2.3 Reference #3	/20	<p>Two (2) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>Half (.5) of a point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
Minimum pass-mark of 70%	42/60	
Total	/115	

Where the Bidder proposes multiple resources, the average score of the acceptable resources will determine the Bidder’s rating score.

Pass-mark

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In order to be judged acceptable, proposals must meet all the mandatory requirements.

Only resources that achieve a pass-mark of 70% on each point-rated criteria **R1 and R2** will be considered for selection on the basis of their financial proposal.

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Mandatory Criteria

Work Stream 4: Writing and Communication Services—Economic Development Issues Facing Aboriginal Peoples in Canada.

Bidder proposals **MUST** meet **ALL** of the mandatory requirements of the work stream to be considered for further evaluation. Failure of a Bidder to meet any one (1) or more of the mandatory requirements will result in the proposal being deemed non-compliant, with the proposal being given no further consideration for the work stream.

WORK STREAM 4 - MANDATORY CRITERIA #1	MET	NOT MET
<p>M1 Qualifications of Resources</p> <p>The Bidder must propose at least one (1) resource and no more than five (5). For each resource named, detailed cover letters and curriculum vitae (CV) must be provided.</p> <p><i>Cover letters may elaborate on details provided in CVs; proposed resources must demonstrate that they meet ALL of the following minimum requirements:</i></p> <ul style="list-style-type: none"> • Graduation with a degree or diploma from a recognized university or a recognized post-secondary educational institution with acceptable specialization in Communications, Public Affairs, Journalism, Economics, Social Sciences or Statistics, or a related field (resources must always have a degree or a diploma, but the specialization does not necessarily have to be acquired as part of a degree or diploma program. The specialization may also be obtained through an acceptable combination of education/course, training and/or professional experience. A justification must be provided in order to show how the specialization enables resource to contribute to Aboriginal economic development research). Proof of education in the form of a photocopy of degree(s) or diploma(s) must be included in the proposal. • A minimum of five (5) years experience delivering writing services and communications advice in the public policy field. • Experience working with Aboriginal organizations and/or communities. • Experience undertaking at least three (3) projects specifically on Aboriginal economic development—writing and communications services related to issues pertinent to Aboriginal peoples in Canada—in which the resource was responsible for undertaking at least one (1) of the following types of activities per project: <ul style="list-style-type: none"> -Conducting research and interviews with subject-matter experts to write articles or success stories on issues pertinent to Aboriginal economic development. -Developing and writing reports (i.e. progress reports, annual reports, corporate business plans, environmental scans, discussion guides, web content, fact sheets, social-media-tailored content) on issues pertinent to 		

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<p>Aboriginal economic development.</p> <ul style="list-style-type: none"> -Preparing presentations and speaking notes for delivery by senior executives at senior-level federal meetings and meetings with stakeholders and/or Aboriginal communities. -Providing communications advice on stakeholder and community outreach and relations. -Developing and implementing communications strategies/plans to support the promotion of complex policy approaches and issues pertinent to Aboriginal economic development. <p>Relevant work experience should be listed chronologically, with brief descriptions of the nature of the work that indicate the depth of the resource’s knowledge and experience.</p> <p>CVs and cover letters should also include information about training, professional attainments, research grants, awards, publications, and any other information deemed relevant by the Bidder. On CVs, all formal training should be listed chronologically; the title of the course or program and duration in days, months or years should be included.</p> <p><i>CVs and cover letters will be used to evaluate resources against Mandatory M1 AND Point-Rated Criteria R1.</i></p>		
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WORK STREAM 4 - MANDATORY CRITERIA #2	MET	NOT MET
<p>M2 Resource Project Summaries, Project Sample & References</p> <p>M2.1 For two (2) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide written project summaries. The project summaries must describe in detail the proposed resource’s experience in successfully providing writing and communications services related to Aboriginal economic development, as described in Appendix D, Statement of Work, during the past five (5) years (dates calculated based on the closing date of the RFP).</p> <p>For one (1) of the three (3) projects listed in the proposed resource’s CV, the Bidder must provide a complete sample of the project results—this must include a sample of the Resource’s professional writing.</p> <p>Within each project summary and project sample provided, the Bidder MUST indicate (a-g):</p> <ul style="list-style-type: none"> a) Name/brief description of the client organization b) Dates/duration (in years/months) of the project c) Total resource level of effort (in days) for the duration of the project d) Description of the services provided by the resource during the project, including roles and responsibilities in relation to the project e) Brief description of the scope and complexity of the project, purpose, objectives, methodological approaches and/or theoretical frameworks utilized, needs, and issues which necessitated the contribution of the proposed resource f) Extent to which the project finished on time, on budget, and in accordance with the established project goals g) Name, title, e-mail address and telephone number of the client project authority <p>The Bidder MUST use Table M2.1—Resource Project Summary Form—for each Project Summary submitted. The Bidder is encouraged to provide detailed responses for each of the requirements set out in the Table. The Bidder should copy Table M2.1 as required.</p> <p>M2.2 The Bidder must include within its Proposal a signed reference letter for each of the project summaries (using template, Table M2.2).</p> <p>The reference must be able to confirm the Resource’s competencies in writing and communications services on issues related to Aboriginal economic development. The reference letter/template must be from an individual or a firm outside of the Bidder’s organization and not from immediate relatives.</p> <p><i>Summaries and references will be used to evaluate resources against Mandatory Criteria M2 AND Point-Rated Criteria R1.2-1.4 and R2.</i></p>		

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Table M2.1—Resource Project Summary Form: Template submitted **MUST** contain the information required in **Mandatory Requirement M2 (a-g)** at a minimum.

Work Stream 4: Writing and Communication Services—Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder Name:		Project Name:	
Resource Name:			
Client Organization [a]:			
Dates/Duration [b]: (in years/months)		Level of Effort (Days) [c]:	
Services provided by the Resource during the project [d]			
Project objectives, scope, needs and issues [e]			
Extent and Role of the Resource’s involvement in the Assignment, including project outcome and results [f]			
Client Project Authority Name, Title, E-mail address, Phone Number [g]			

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Resource Reference Form (Table M2.2)

Table M2.2—Proposed Resource Reference Form (Table M2.2): may provide additional detail as necessary; however template submitted **MUST** contain at least the information required in **Mandatory Requirement M2 (a-g)**.

Work Stream 4: Writing and Communication Services—Economic Development Issues Facing Aboriginal Peoples in Canada			
Bidder name :			
Resource name :			
Reference name, title and organization :			
Reference contact information :	Email: _____ Telephone: () - _____		
Project Name and Scope of work accomplished for the reference :			
Services provided by the Resource during the project			
Reference Criteria			Yes
			No
1. Was the Resource primarily responsible for the...			
... management of the project	Yes () / No ()	... completion of the project	Yes () / No ()
2. Did the Resource meet the following critical factors :			
a) Completed the project on time.			
b) Stayed within budget.			
c) Met all the project objectives.			
d) Complied with the terms and conditions of the contract/project (ex. Statement of Work).			
3. Did the Resource possess and demonstrate the following abilities :			
a) The ability to develop sound methodologies.			
b) The ability to coordinate multiple tasks.			
c) The ability to understand and analyze complex issues related to Aboriginal economic development.			
d) The ability to provide quality and complete deliverables.			
e) Completed product(s) adequate to inform your policy and research goals.			
f) Delivered final products that did not require methodological, organizational, or subject-matter-expert intervention on your end.			
g) Delivered final products free from errors or structural issues requiring editorial intervention on your end.			
h) Delivered final products of a quality you would define as excellent.			
i) Worked with you to meet your needs in a professional manner that you would define as excellent.			
4. Would you retain the services of this Resource again?			
5. As the “Referrer” providing this reference, I have read the Project Scope provided above in this Reference form, and agree with the description of the work conducted by the Resource for the project.			
Signature : _____ Date: _____			

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Point-Rated Criteria

Work Stream 4: Writing and Communication Services—Economic Development Issues Facing Aboriginal Peoples in Canada

R1 Resource Qualifications and Experience		
The evidence within the cover letters, CV(s), project summaries, and project sample (including writing sample) for the Bidder’s proposed Resource(s), submitted in response to Mandatory Requirements M1 and M2 will be evaluated on the breadth of the individual’s expertise regarding the provision of writing and communications services related to Aboriginal economic development, as defined in the Statement of Work.		
Criteria	Weight	Evaluation Factors
R1.1 Education attainment	/5	5 points for formal educational achievement above and beyond a degree or diploma. Qualified achievements include a Master’s degree or a PhD and/or additional professional certificate or diploma. Degrees, diplomas, and certificates must be from a recognized university or a recognized post-secondary educational institution with acceptable specialization in Communications, Public Affairs, Journalism, Economics, Social Sciences or Statistics, or a related field (a justification must be provided in order to show how the education attainment enables the resource to contribute to Aboriginal economic development research). Proof of education (a photocopy of the degree, diploma, or certificate) must be included in the proposal.
R1.2 Experience in conducting writing and communications services thematically relevant to Aboriginal economic development in Canada.	/20	Four (4) points will be allocated per type of the following activities undertaken in the project summaries and project sample: -Conducting research and interviews with subject-matter experts to write articles or success stories on issues pertinent to Aboriginal economic development. -Developing and writing reports (i.e. progress reports, annual reports, corporate business plans, environmental scans, discussion guides, web content, fact sheets, social-media-tailored content) on issues pertinent to Aboriginal economic development. -Preparing presentations and speaking notes for delivery by senior executives at senior-level federal meetings and meetings with stakeholders and/or Aboriginal communities. -Providing communications advice on stakeholder and community outreach and

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		<p>relations. -Developing and implementing communications strategies/plans to support the promotion of complex policy approaches and issues pertinent to Aboriginal economic development.</p> <p>Up to 20 points.</p>
<p>R1.3 Experience in conducting writing and communications services thematically relevant to Aboriginal economic development in Canada.</p>	<p>/15</p>	<p>Three (3) points will be allocated per theme addressed in the project summaries and project sample:</p> <ul style="list-style-type: none"> -Legislative solutions to <i>Indian Act</i> barriers -The modern treaty environment -Institutional development and mature jurisdictional relationships -Opt-in legislative regimes -Modern land management -Aboriginal participation in major resource projects -Financial participation -Access to capital -Aboriginal business development and readiness -Community opportunity readiness -Skills, training, and education -Aboriginal youth -Aboriginal women -Métis-relevant policies and programs -First Nations-relevant policies and programs -Inuit-relevant policies and programs -The North <p>Up to 15 points.</p>
<p>R1.4 Evaluation of professional writing sample.</p>	<p>/15</p> <p>15 pts = Excellent</p> <p>12 pts = Acceptable</p> <p>9 pts = Below expectations</p> <p>0 pts= Poor</p>	<p>The professional writing sample will be evaluated based on clarity, grammar, precision, organization of thoughts, depth and breadth of knowledge, and the level of analytical and methodological sophistication demonstrated.</p> <p>The following scale will be used to evaluate each sample.</p> <p>Excellent: Very complete, relevant, and clear; neat, logical and easy to follow; precise and correct references; grammatically sound; sophisticated analysis and methodology.</p> <p>Acceptable: Relatively complete, relevant,</p>

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		<p>and clear: fairly neat, logical and easy to follow; rather precise and generally correct references; basically grammatically sound; somewhat sophisticated analysis and methodology.</p> <p>Below expectations: More or less complete, relevant, and clear: more or less neat, logical and easy to follow; some imprecision; some problems with references; some grammatical mistakes; lacking in sophistication analytically and methodologically.</p> <p>Poor: Incomplete, irrelevant, and unclear: lacking neatness, logic, and organization; imprecise; lacking grammatical solidity; unsophisticated analysis and methodology.</p> <p>Up to 15 points.</p>
<p>Minimum Pass-Mark of 70%</p>	<p>39 /55</p>	
<p>R2 Resource References The evidence within the reference template for the Bidder’s proposed Resource submitted in response to the Mandatory Requirement M2.2, will be evaluated on the quality of the individual’s reference in regards to the provision of writing and communications services related to Aboriginal economic development, as defined in the Statement of Work.</p>		
<p>R2.1 Reference #1</p>	<p>/20</p>	<p>Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p> <p>Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).</p>
<p>R2.2 Reference #2</p>	<p>/20</p>	<p>Two (2) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2).</p> <p>One point will be allocated for each “Yes” answer for section 2 and 3 of the Resource Reference Form (Table M2.2).</p>

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		Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).
R2.3 Reference #3	/20	Three (3) points will be allocated if the resource was managing the project and one (1) point if the resource was responsible for completing the project (under a project manager) in section 1 of the Resource Reference Form (Table M2.2). One point will be allocated for each “Yes” answers for section 2 and 3 of the Resource Reference Form (Table M2.2). Four (4) points will be allocated for an answer of “Yes” to section 4 of the Resource Reference Form (Table M2.2).
Minimum Pass-Mark 70%	42 /60	
Total	/115	

Where the Bidder proposes multiple resources, the average score of the acceptable resources will determine the Bidder’s rating score.

Pass-mark

In order to be judged acceptable, proposals must meet all the mandatory requirements.

Only resources that achieve a pass-mark of 70% on each point-rated criteria **R1 and R2** will be considered for selection on the basis of their financial proposal.

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2.0 Financial Proposal

- 2.1 Bidders meeting ALL Mandatory Requirements and achieving at least the required minimum percentage score on the Point-Rated Criteria will be evaluated on the basis of their Financial Proposal.
- 2.2 The Financial Evaluation will be carried out by the Contracting Authority independent of the DIAND Evaluation Committee responsible for rating the Technical Proposal. Financial Proposals will be evaluated based on the methodology detailed below.
- 2.3 *All of the information required in this section MUST appear in the Bidder’s Financial Proposal ONLY. The Bidder’s Financial Proposal MUST be submitted in a sealed envelope, separate from the Bidder’s Technical Proposal. The Bidder’s failure to comply with this condition will result in the Bidder’s Proposal being declared non-compliant and being given no further consideration.*
- 2.4 For each year of the SOA, Bidders **MUST** provide a fixed All-Inclusive per diem rate (\$CAD), based on a 7.5 hour day.
- 2.5 The fixed All-inclusive per diem rates **MUST** be inclusive of all payroll, overhead costs and profits required for the Bidder to complete the work under the SOA (note: the fixed all-inclusive per diem rate is not to be quoted as a range).
- 2.6 The Bidder’s fixed all-inclusive per diem rates shall be **exclusive** of the Goods and Services Tax (GST) and/or the Harmonized Sales Tax (HST) and expenses. Any amounts for taxes will be added at time of Call-up. Any additional travel, living administrative or other expenses, will be added by DIAND at time of Call-up.

The Bidder must clearly identify in their bid for which Stream they are submitting a proposal for and must submit a separate proposal for each Stream.

STREAM: _____

RESOURCE(S)	YEAR 1 PER DIEM RATES (CAD\$) Award to March 31, 2016 A	YEAR 2 PER DIEM RATES (CAD\$) April 1, 2016 to March 31, 2017 B	YEAR 3 PER DIEM RATES (CAD\$) April 1, 2017 to March 31, 2018 C	OPTION YEAR 1 PER DIEM RATES (CAD\$) April 1, 2018 to March 31, 2019 D	OPTION YEAR 2 PER DIEM RATES (CAD\$) April 1, 2019 to March 31, 2020 E	OPTION YEAR 3 PER DIEM RATES (CAD\$) April 1, 2020 to March 31, 2021 F	AVERAGE PER DIEM RATE (G) A+B+C+D+E+ F / 6 = G
	\$	\$	\$	\$	\$	\$	
AVERAGE PER DIEM RATE (G)							

Where the Bidder proposes multiple resources, the proposed per diem rates for all proposed resources will be averaged to derive the Bidder’s average all-inclusive per diem rate for evaluation purposes.

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2.7 Price Support

DIAND reserves the right to request price support from Bidders following the Technical Evaluation. Acceptable price support is one or more of the following:

- a) a current published price list indicating the percentage discount available; or
- b) paid invoices for like services sold to other customers; or
- c) a most favoured customer price certification statement.

3.0 Basis of Selection

3.1 Only compliant Proposals will be considered.

3.2 Only Proposals that have met all Mandatory Requirements, and have achieved or exceeded the required minimum score in each of the Point-Rated Criteria will be considered. All Proposals will be rated on technical acceptability before price is considered.

The SOAs will be awarded based on a determination of Best Value taking into account both the technical merit of the Proposals and the Financial Evaluation.

The Bidder(s) will be selected on the basis of the highest combined rating of technical merit and price:

$$\begin{array}{rcl}
 \frac{\text{Bidder's points}}{\text{Total technical points}} & * 70 & = \text{Prorated Technical Score} \\
 \\
 \frac{\text{Lowest bid}}{\text{Bidder's cost}} & * 30 & = \text{Financial Score} \\
 \hline
 \text{Total Score} & = & /100
 \end{array}$$

3.3 As a result from this proposal call, DIAND intends to award Standing Offer Agreements (SOA) per stream as follows;

- Stream 1: Research and Policy Development Services (up to 3)
- Stream 2: Quantitative Analysis (up to 3)
- Stream 3: Meeting, Design, Organization, and Facilitation (up to 3)
- Stream 4: Communications Services and Support (up to 3)

In a companion Request for Standing Offer Agreements (RFSO) 1000164232, DIAND is seeking to establish up to fourteen (14) SOAs.

In the event that less than fourteen (14) SOAs are awarded under RFSO 1000164232 to this solicitation, DIAND will increase the number of competitively awarded SOAs under this solicitation up to a total of twenty six (26) SOAs overall.

3.4 In the event that more than one (1) Proposal receives the same Total Score, of those Proposals, the Proposal with the higher technical score will be considered to represent Best Value.

3.5 DIAND reserves the right to refuse any and all Proposals received in response to this RFP, without incurring any obligation to any Bidder having responded. DIAND reserves the right to award an SOA to the compliant Bidder that best meets the requirements, as described above, without incurring any obligation to any other Bidders having responded to this RFP.