



**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION / SOUMISSION**

**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À :**

**Bids must be submitted by email and must be
submitted ONLY to the following email address:**

**Les soumissions doivent être présentées par courriel
et UNIQUEMENT à l'adresse suivante :**

soumission.bid@aadnc-aandc.gc.ca

**REQUEST FOR PROPOSALS
DEMANDE DE PROPOSITION**

Proposal to DIAND:

We hereby offer to sell to Her Majesty the Queen in right of Canada, as represented by the Minister of Indian Affairs and Northern Development, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition aux MAINC:

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, représenté par le Ministre des Affaires indiennes et du Nord, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Bidder - Soumissionnaire Name - Raison sociale
Address - Adresse
Telephone Number - Numéro de téléphone
GST/HST Number - Numéro de la TPS/TVH
QST Number - Numéro de la TVQ

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Title - Titre Event and Travel Planning Management	
Solicitation Number - Numéro de l'invitation 1000166855	
Date (YYYYMMDD) - Date (AAAAMMJJ) 2014-11-18	
Solicitation Closes - L'invitation prend fin At - À 3:00	Time Zone - Fuseau horaire Eastern Standard Time (EST)
On (YYYYMMDD) - Le (AAAAMMJJ) 2014-12-08	
Contracting Authority - L'autorité contractante Name - Nom Céline Viner	
Telephone Number - Numéro de téléphone 819-994-7304	
Facsimile Number - Numéro de télécopieur 819-953-7830	
Email Address - Courriel celine.viner@aadnc-aandc.gc.ca	
Destination(s) of Services - Destination(s) des services Canada	
Instructions: See Herein - Voir aux présentes	
Delivery Required - Livraison exigée See Herein - Voir aux présentes	
Person Authorized to sign on behalf of Bidder Personne autorisée à signer au nom du soumissionnaire Name - Nom	
Title - Titre	

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PART 1 - GENERAL INFORMATION

1. Statement of Work

The Work to be performed is detailed at Annex "A".

2. Greening Government Operations

In April 2006, the Government of Canada issued a policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired. The environmental impact assessment of a product and/or service considers the whole life cycle of the product and/or service. Department of Indian Affairs and Northern Development (DIAND) procurements will be including more demanding environmental criteria to encourage product/service suppliers to improve their operations to reduce their negative impact on the environment.

3. Set-aside under the Federal Government's Procurement Strategy for Aboriginal Business (PSAB)

This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business.

4. Debriefings

After contract award, bidders may request a debriefing on the results of the bid solicitation process. Bidders must make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person as determined by Canada.

5. Office of the Procurement Ombudsman (OPO)

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise concerns regarding the award of contracts under \$25,000 for goods and under \$100,000.00 for services. Additional information on the services of the OPO is available at www.opo-boa.gc.ca.

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation 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.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation with the following adaptations:

- a) References to Public Works and Government Services Canada (PWGSC) are replaced by the Department of Indian Affairs and Northern Development (DIAND);

- b) Section 03 is amended as follows:
- Delete: "Pursuant to the *Department of Public Works and Government Services Act* (S.C. 1996, c.16"
- c) Section 05, Subsection 2, is amended as follows and renumbered accordingly: :
- Delete: d. "send its bid only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the bid solicitation or to the address specified in the bid solicitation. The facsimile number and related instructions for bids transmitted by facsimile are provided in section 08";
- Insert: d. send its bid only to the Bid Receiving Address specified on page 1 of the bid solicitation;
- Delete: e. "ensure that the Bidder's name, return address, the bid solicitation number, and bid solicitation closing date and time are clearly visible on the envelope or the parcel(s) containing the bid"
- d) Section 05, Subsection 4 is amended as follows:
- Delete: 60 days
Insert: 180 days
- e) Section 08 is amended as follows:
- Delete: Subsections 1 - 3
- Insert: Due to the nature of the bid solicitation, bids transmitted by facsimile to DIAND will not be accepted.
- f) Section 12, Subsection 1 is amended as follows and renumbered accordingly:
- Delete:
- a. "the Bidder is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which renders the Bidder ineligible to bid on the requirement;
- b. an employee, or subcontractor included as part of the bid, is subject to a Vendor Performance Corrective Measure, under the Vendor Performance Corrective Measure Policy, which would render that employee or subcontractor ineligible to bid on the requirement, or the portion of the requirement the employee or subcontractor is to perform";
- g) Section 17, Subsection 1 c) is revised as follows:
- c) the name of the representative of the joint venture who will be named as the Lead Member in any resulting contract, i.e. the member chosen by the other members to act on their behalf, if applicable;
- h) Section 17, Subsection 3 is amended as follows:

Delete: "The bid and any resulting contract must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of all members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any resulting contract."

Insert: "The bid must be signed by all the members of the joint venture. The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the bid solicitation and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of any resulting contract."

- i) Section 20, is amended as follows:

Delete: Subsection 2.

2. Submission of Bids

- 2.1** Bids (and any amendments thereto) must be submitted only by Email to the Department of Indian Affairs and Northern Development (DIAND) Bid Receiving Address by the date and time indicated on page 1 of the bid solicitation. DIAND will not assume responsibility for bids (and any amendments thereto) directed to any other locations. Bids submitted by any other means will not be accepted.
- 2.2** The total size of the Email, including all attachments, must not exceed 15 megabytes (MB). It is solely the Bidder's responsibility to ensure that the total size of the Email does not exceed this limit.

It is important to note that Email systems can experience systematic delays and, at times, large attachments may cause systems to hold or delay transmission of Emails. It is solely the Bidder's responsibility to ensure that the Contracting Authority receives a bid on time, in the mailbox that has been identified for bid receipt purposes. Date stamps for this form of transmission are not acceptable.

2.3 Email Submissions

In the Email containing their proposal, Bidders must clearly identify the RFP number in the Subject Line and must clearly identify the following in the body of the Email:

- Contracting Authority
- Closing Date:
- Bidder's Name and Address
- *"Tender Documents Attached"*

3. Former Public Servant

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

contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the Financial Administration Act, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c.C-17, the Defence Services Pension Continuation Act, 1970, c.D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c.R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c.R-11, the Members of Parliament Retiring Allowances Act, R.S., 1985, c.M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **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 adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 7 days calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders 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 question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

5. Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, 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 bidders.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that bidders provide their bid as separate attachments to their Email as follows:

Attachment I: Technical Bid in PDF format.

Attachment II: Financial Bid in PDF format.

Attachment III: Certifications

Section I: Technical Bid

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

The technical bid should address clearly and in sufficient depth, the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment detailed in Annex "B". The total amount of Applicable Taxes must be shown separately.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

The Mandatory Criteria listed below will be evaluated on a simple Pass/Fail (i.e. responsive/non-responsive (compliant/non-compliant) basis. Bidders who fail to meet one of the Mandatory Criteria will be deemed non-responsive and given no further consideration.

Bids must provide the necessary documentation to support compliance.

	Mandatory Criteria	Proposal Reference Page	Pass	Fail
M1	Bidder Overview 1.1 The Bidder MUST provide the following at a minimum: a) The full legal name of the entity submitting the Proposal and identification of the Bidder's proposed parties to the Proposal, (including, as applicable, all joint venture or members, partners and subcontractors); b) Relationships and internal controls amongst the proposed parties to the Proposal, including a description of how the Contractor's Senior Event Manager can effectively manage the work including a definition of his/her relationship to each Party and the DIAND Project Authority, including a discussion of control functions such as workload control, human and financial resources allocation, budget, Contractor performance and other related services; c) The Bidder's business locations.			
M2	2.1 The Bidder MUST provide the following, at a minimum: a) Named resources proposed against the following resource category roles: i. One (1) Event Manager; ii. One (1) Financial Manager; iii. One (1) Event Coordinator; b) A detailed Curriculum Vitae (CV) for each proposed named resource. 2.2 Each resource CV MUST include the following information: a) The name of the proposed resource; b) Chronological work experience including duration and start and finish dates (dates should be identified by month and year – for example March 2009 – February 2014).			
M3	Resource Qualifications 3.1 The Bidder's proposed named resources MUST meet all of DIAND's minimum qualification requirements against which they have been proposed: a) Event Manager (One required) The named resource MUST demonstrate: i. at least two (2) years within the last five			

	<p>(5) years experience in leading the development and execution of events, particularly;</p> <p>ii. having managed at least three (3) events where the firm's assigned portion of the overall budget was at least \$100,000.00 or where there were a minimum of 50 participants; and</p> <p>iii. having provided or overseen the provision of any three (3) of the following services - accommodations, hospitality, transportation, and travel reimbursement during the execution of at least three (3) events.</p> <p>b) Financial Manager (One required)</p> <p>The named resource MUST demonstrate:</p> <p>i. at least three (3) years of experience within the last five (5) years providing financial management in any of the following fields - Event /Hospitality /Hotel Management or Tourism, and</p> <p>ii. having managed the financial aspects of at least three (3) events/projects where the firm was responsible for the receipt, management and disbursement of funds received from the client, including reimbursement of travel expenses, or from any other source for projects with a total cost of \$50,000 or more.</p> <p>c) Event Coordinator (One required)</p> <p>The named resource MUST demonstrate:</p> <p>i. at least two (2) years of experience within the last five (5) years in coordinating the execution of events;</p> <p>ii. having coordinated at least three (3) events where their firm's assigned portion of the overall budget was at least \$100,000.00 or where there were a minimum of 50 participants; and</p> <p>iii. having coordinated the provision of any three (3) of the following services - accommodations, hospitality, transportation, and travel reimbursement during the execution of at least three (3) events.</p>			
M4	<p>Project Summaries</p> <p>4 The Bidder MUST provide three (3) written project summaries describing in detail the Bidder's current/previous experience in successfully providing Events Planning and Management</p>			

	<p>services, similar and relevant to those as described in the Statement of Work. Projects MUST have taken place during the past five (5) years.</p> <p>4.1 At least one (1) of the three (3) project summaries cited MUST describe the provision of these services to client organizations within the public sector.</p> <p><i>A client organization in the public sector is defined as an organization created as a legal entity through an act in Parliament or an organization that is regulated by a provincial/territorial government.</i></p> <p>4.2 All three (3) of the project summaries MUST be valued at a minimum of \$100,000.00.00 (CAD) to the Bidder or been events where there were a minimum of 50 participants</p> <p>4.3 Within EACH project summary provided, the Bidder MUST indicate the following:</p> <ul style="list-style-type: none"> a) The name of the client organization; b) The role of the proposed resources in the event; c) A brief description of the type and scope of Events Planning and Management services provided; d) The dollar-value of the project (to the Bidder); e) Project duration, including start and finish dates (dates should be identified by month and year – for example March 2009 – February 2014); and f) Name, title, and valid contact information (any of a telephone number, fax number, or e-mail) of a person within the client organization who possessed oversight or approval authority over the Bidder's work for the cited project. <p><i>Failure to provide all of the above information with respect to the cited project summary will render the Bidder's Proposal non-compliant.</i></p>			
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1.1.2 Point Rated Technical Criteria

Only those Proposals meeting ALL of the above Mandatory Requirements (**M1-M4**) will be deemed compliant and will be evaluated by the DIAND Evaluation Team on the basis of the Point-Rated Criteria.

Bidders **MUST** achieve a minimum score of **70%** (165/235) overall on Point-Rated Criteria **R1-R4** in order to be evaluated on the basis of their Financial Proposal.

Bidders failing to meet the minimum required score on the Point-Rated Criteria will be deemed non-compliant and given no further consideration.

The following **Rating Scale** identifies the rating scale that will be applied to each Evaluation Factor (R1 – R4)

Rating	Description
Non-existent/ Unsatisfactory	No response was received for this factor or the response does not address any of the elements of the factor; therefore, the response cannot be considered to have any merit. 0 points
Poor	The response is not complete in that it fails to address all the elements of the factor and only nominally addresses some elements of the factor or the requirement was not the primary focus of the information provided; therefore, the response is considered to have very little merit. 1 to 3 points
Minimal	The response is not complete in that it fails to fully address some of the elements of the factor; is not clear, is incomplete, or Contractor may have had no accountability for project outcomes and costs described; therefore the response is considered to have insufficient merit. 4 to 5 points
Satisfactory	The response is complete in that it addresses in some detail each of the elements of the factor while providing some supporting detail for most of these elements; or the Contractor may have had only shared accountability for project outcomes and costs; therefore the response is considered on balance to have satisfactory merit. 6 to 7 points
Good	The response is complete in that it addresses and provides some supporting detail for each of the elements of the factor; and may show that the Contractor had full accountability for project outcomes and costs; therefore, the response is considered to have a good level of merit. 8 to 9 points

Excellent	<p>The response is complete in that it addresses and provides exceptionally relevant supporting detail for each of the elements of the factor and may show that the Contractor had full accountability for project outcomes and costs; therefore, the response is considered to have outstanding merit.</p> <p>10 points</p>
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Merit in this instance is defined as the extent to which the description satisfies the elements of the stated factor.

For evaluation purposes:

- **Relevance** of experience means the similarity of the skills required and the types of work performed with respect to DIAND's requirement as expressed within the Statement of Work; and
- **Extent** of experience means the number of projects performed or number of years in full time employment, performing work that is relevant to DIAND's requirement as expressed within the Statement of Work.

Point-Rated Criterion	Weight	Evaluation Factors	Cross Referenced
R1 Project Summaries Each of the three (3) submitted project summaries provided in response to Mandatory Requirement M4 will be evaluated on the basis of the cited project's relevance and similarity to DIAND's requirements, as defined in the SOW, for Events Planning and Management services.	/120	<p>Up to a maximum of one hundred and twenty (120) points, based on up to forty (40) points per project, on the extent to which the three (3) cited project summaries are relevant and similar to DIAND's requirements for event and travel planning management services, with regard to the following specific factors:</p> <p>a) The similarity and relevance of the client's organization's environment and requirements for which the Bidder provided services (such as working within the public versus private sector, mandate of the client, objective of the project, any issues, and challenges of the project), and the extent to which these factors are consistent with DIAND's requirement as expressed within the Statement of Work (up to 10 points/project);</p> <p>b) The scope, range and complexity of event and travel planning management services provided by the Bidder (such as the length of the project timeline, number and profile of participants, reimbursement of travel cost for participants, relative dollar value of the project to the client, diversity of services provided), and the extent to which these factors are consistent with DIAND's requirement as expressed within the Statement of Work (up to 10 points/project);</p> <p>c) The project management approach employed by the Bidder within the cited project, including processes for: resource management and</p>	

Point-Rated Criterion	Weight	Evaluation Factors	Cross Referenced
		<p>availability, controlling time and cost; managing risk; maintaining regular communication; and reporting any issues and challenges as they emerge (up to 10 points per project) ; and</p> <p>d) The quality assurance approach employed by the Bidder within the cited project (relative to accuracy, timeliness, completeness, and consistency) amongst different teams of resources (including sub-Contractors), to ensure the acceptability of services and deliverables provided, consistent with DIAND's requirement as expressed within the Statement of Work (up to 10 points/project).</p> <p><i>The following rating scale will be used to evaluate each project on the basis of factors 'a' to 'd' above:</i></p> <p>Excellent = 10points/factor per project Good = 8 to 9 points/factor per project Satisfactory = 6 to 7 points/factor per project Minimal = 4 to 5 points/factor per project Poor = 1 to 3 points/factor per project Non-existent/Unsatisfactory = 0 points/factor per project</p>	
<p>R2 Proposed Resource - Event Manager</p> <p>The CV and any relevant Project Summaries involving the Bidder's Event Manager Resources (proposed in compliance with Mandatory Requirements M2 and M3), will be evaluated on the extent and relevance of each individual's experience, knowledge and skills regarding the provision of Events Planning and Management services.</p> <p>CVs should provide detailed information regarding the proposed individual's qualifications, education, linguistic capabilities and relevant experience in direct relation to DIAND's requirements, as defined within the statement of work.</p>	/60	<p>Up to sixty (60) points, for the extent and relevance of the Bidder's named Event Manager Resources' experience in relation to DIAND's requirement as expressed within the Statement of Work, with regard to the following specific factors:</p> <p>a) Successful completion of an undergraduate degree from a recognized university or a diploma and/or certificate from a college, in either Event /Hospitality /Hotel Management, Tourism or a similar related field (up to 10 points);</p> <p>b) The three (3) events necessary to satisfy mandatory requirement 3.1a)ii will be point rated as follow:</p> <p>Relevant experience in leading the development and execution of large scale events (where the firm's assigned portion of the overall budget was at least \$100,000.00 OR where there were a minimum of 50 participants) (up to 10 points);</p> <p>c) Relevant experience in leading the development and execution of events that involved respecting and accommodating cultural practices or preferences (up to 10 points);</p> <p>d) Relevant experience in effective financial</p>	

Point-Rated Criterion	Weight	Evaluation Factors	Cross Referenced
		<p>management, including cost control, realizing efficiencies and preventing overruns, relevant to DIAND's requirement (up to 10 points);</p> <p>e) Relevant experience in effectively managing project relations among multiple stakeholders (including the client, the Contractor, sub-Contractors and other stakeholders), including communication, issue identification, and dispute resolution practices, relevant to DIAND's requirement (up to 10 points);</p> <p>f) Experience working with Aboriginals, Aboriginal communities and Aboriginal Organizations (up to a maximum of 10 points);</p> <p><i>The following rating scale will be used to evaluate factor 'a' above:</i></p> <p>Demonstrated completion of education = 10 points/factor Did not demonstrate completion of education = 0 points/factor</p> <p><i>The following rating scale will be used to evaluate factors 'b' to 'f' above:</i></p> <p>Excellent = 10 points/factor Good = 8 to 9 points/factor Satisfactory = 6 to 7 points/factor Minimal = 4 to 5 points/factor Poor = 1 to 3 points/factor Non-existent/Unsatisfactory = 0 points/factor</p>	
<p>R3 Proposed Resource – Financial Manager</p> <p>The CV and any relevant Project Summaries involving the Bidder's Financial Manager Resources (proposed in compliance with Mandatory Requirements M2 and M3), will be evaluated on the extent and relevance of each individual's experience, knowledge and skills regarding the provision of Events Planning and Management services.</p> <p>CVs should provide detailed information regarding the proposed individual's qualifications, education, linguistic capabilities and relevant experience in direct relation to DIAND's requirements, as defined</p>	/50	<p>Up to fifty (50) points, for the extent and relevance of the Bidder's named Financial Manager Resources' experience in relation to DIAND's requirement as expressed within the Statement of Work, with regard to the following specific factors:</p> <p>a) Successful completion of an undergraduate degree from a recognized university or a diploma and/or certificate from a college, in either Event /Hospitality /Hotel Management, Tourism or a similar related field (up to 10 points)</p> <p>b) The three (3) events necessary to satisfy mandatory requirement 3.b)ii will be point rated as follow:</p> <p>Relevant experience in leading financial aspects in the development and execution of large scale events (where the firm's assigned portion of the overall budget was at least \$100,000.00 OR where there were a minimum of 50 participants</p>	

Point-Rated Criterion	Weight	Evaluation Factors	Cross Referenced
within the statement of work.		<p>(up to 10 points);</p> <p>c) Relevant experience in effective financial management, including cost control, realizing efficiencies and preventing overruns, relevant to DIAND's requirement (up to 10 points);</p> <p>d) Relevant experience in effectively managing the issuing, processing and reimbursement of travel reimbursement to participants, relevant to relevant to DIAND's requirement (up to 10 points);</p> <p>e) Experience working with Aboriginals, Aboriginal communities and Aboriginal Organizations (up to a maximum of 10 points);</p> <p><i>The following rating scale will be used to evaluate factor 'a' above:</i></p> <p>Demonstrated completion of education = 10 points/factor</p> <p>Did not demonstrate completion of education = 0 points/factor</p> <p><i>The following rating scale will be used to evaluate factors 'b' to 'e' above:</i></p> <p>Excellent = 10 points/factor</p> <p>Good = 8 to 9 points/factor</p> <p>Satisfactory = 6 to 7 points/factor</p> <p>Minimal = 4 to 5 points/factor</p> <p>Poor = 1 to 3 points/factor</p> <p>Non-existent/Unsatisfactory = 0 points/factor</p>	
R4 Proposal Quality The ability of the Bidder to follow instructions in the RFP response is considered indicative of the Bidder's ability to conform to the	/5	<p>Up to a maximum of five (5) points will be awarded based on the following factors:</p> <p>a) Ordering/structuring the proposal logically, with clearly indicated sections of the Proposal,</p>	

Point-Rated Criterion	Weight	Evaluation Factors	Cross Referenced
<p>client's specifications during the project.</p> <p>The overall presentation of the Proposal should provide thorough responses that present the required information in an easy to find manner with clear references to substantiating information.</p>		<p>responding to the order and sequence of the Mandatory and Point-Rated Criteria in a manner which facilitates a clear and straightforward evaluation (up to 3 points);</p> <p>Overall quality of the proposal as it relates to presentation of information and ease-of-use (including clarity, lack of confusion, absence of typos, and grammatical correctness) (up to 2 points).</p>	
Overall Technical Score (R1-R4)	165/235	ONLY THOSE PROPOSALS ACHIEVING A MINIMUM SCORE OF 165/235 (70%) ON POINT RATED CRITERIA R1-R4 (inclusive) WILL BE EVALUATED ON THE BASIS OF THE BIDDER'S FINANCIAL PROPOSAL.	

1.3 Financial Evaluation

A minimum score of 70% must be achieved in the evaluation of point rated technical criteria R1 – R4 in order for the proposal to be considered for financial evaluation. Proposals that fail to meet the minimum required score will be deemed non-responsive and given no further consideration.

All of the information required in Annex B, Basis of Payment, Tables A , B and C must appear in the Bidder's Financial Proposal ONLY. The bidder's financial proposal MUST be submitted separately from the Technical proposal.

2. Basis of Selection - Highest Rated Within Budget

1. To be declared responsive, a bid must:
 - (a) comply with all the requirements of the bid solicitation;
 - (b) meet all mandatory technical evaluation criteria; and
 - (c) Achieve a minimum score of 165/235 (70%) on the point rated criteria R1-R4 inclusive)
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. The responsive bid with the highest number of points will be recommended for award of a contract, provided that the total evaluated price does not exceed the budget available for this requirement.

The maximum funding available for the Contract resulting from the bid solicitation is **\$330,800.00 or \$280,800.00 for five (5) Green Mining Workshops/Roundtables and \$50,000.00 for one (1) Procurement Workshop/Roundtable** (Goods and Services Tax or Harmonized Sales Tax included). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

In the event that more than one (1) Proposal receives the same Total Technical Score, the lowest financial Proposal will be considered for contract award.

PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and associated information to be awarded a contract.

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue whether during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with this request will also render the bid non-responsive or will constitute a default under the Contract.

1. Certifications Required Precedent to Contract Award

1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.2 Federal Contractors Program for Employment Equity – Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

2. Additional Certifications Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

2.1 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.

2.2 Set-Aside for Aboriginal Business

1. This procurement is set aside under the federal government's Procurement Strategy for Aboriginal Business, as detailed in Annex 9.4, Requirements for the Set-aside Program for Aboriginal Business, of the *PWGSC Supply Manual*.
2. The Bidder:
 - i. certifies that it meets, and will continue to meet throughout the duration of any resulting contract, the requirements described in the above-mentioned annex;
 - ii. agrees that any subcontractor it engages under any resulting contract must satisfy the requirements described in the above-mentioned annex; and
 - iii. agrees to provide to Canada, immediately upon request, evidence supporting any subcontractor's compliance with the requirements described in the above-mentioned annex.
3. The Bidder must check the applicable box below:

() The Bidder is an Aboriginal business that is a sole proprietorship, band, limited company, co-operative, partnership or not-for-profit organization.

OR

() The Bidder is either a joint venture consisting of two or more Aboriginal businesses or a joint venture between an Aboriginal business and a non-Aboriginal business.
4. The Bidder must check the applicable box below:

() The Aboriginal business has fewer than six full-time employees.

OR

() The Aboriginal business has six or more full-time employees.
5. The Bidder must, upon request by Canada, provide all information and evidence supporting this certification. The Bidder must ensure that this evidence will be available for audit during normal business hours by a representative of Canada, who may make copies and take extracts from the evidence. The Bidder must provide all reasonably required facilities for any audits.

6. By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.
7. If requested by the Contracting Authority, the Bidder must provide the following certification for each owner and employee who is Aboriginal:
 1. I am _____ (insert "an owner" and/or "a full-time employee") of _____ (insert name of business), and an Aboriginal person, as defined in Annex 9.4 of the *Supply Manual* entitled "Requirements for the Set-aside Program for Aboriginal Business".
 2. I certify that the above statement is true and consent to its verification upon request by Canada.

Printed name of owner and/or employee

Signature of owner and/or employee

Date

1.2.3 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of the contract:

1. Security Requirement

- 1.1 There is no security requirement applicable to this contract.

2. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

3. Standard Clauses and Conditions

All clauses and conditions identified in the Contract 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.

3.1 General Conditions

2010B (2014-09-25), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract with the following adaptations:

- a) References to Public Works and Government Services Canada (PWGSC) are replaced by the Department of Indian Affairs and Northern Development (DIAND); and

b) "Pursuant to the *Department of Public Works and Government Services Act* (S.C. 1996, c.16," is deleted from the text under Section 2 – Standard Clauses and Conditions.

c) Section 10, Subsection 1 is amended as follows:

Delete: "Invoices must be submitted in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery".

Insert: "Invoices must be submitted by Email to the Project Authority in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery".

d) Section 10, Subsection 2 , paragraph a. is amended as follows:

Delete: "the date, the name and address of the client department, item or reference numbers, deliverable/description of the Work, contract number, Client Reference Number (CRN), Procurement Business Number (PBN), and financial code(s)".

Insert: "the contract title and number, the date, Procurement Business Number (PBN), deliverable/description of the Work, evidence of actual costs (cost reimbursable elements) and timesheets (if payment is based on hourly or per diem rates).

3.2 Supplemental General Conditions

3.2.1 Indemnification

The Contractor must indemnify and save harmless Canada from and against all claims, demands, losses, costs, damages, actions, suits or other proceedings by whomsoever made, brought or prosecuted in any manner based upon, occasioned by or attributable to the activities of the Contractor under this Contract.

4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from contract award to March 31, 2015 inclusive.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **will be identified at contract award**

Title: _____

Department of Indian Affairs and Northern Development

Directorate: Materiel and Assets Management Directorate

Address: _____

Telephone: _____

Facsimile: _____
 E-mail address: _____

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority through a Contract amendment. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

5.2 Project Authority

The Project Authority for the Contract is:

Name: **will be identified at contract award**

Title: _____

Department of Indian Affairs and Northern Development

Directorate: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

The Project Authority is the representative of the department for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority however the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Limitation of Expenditure – Professional Services

- 7.1.1 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 \$ _____ (**insert the amount at contract award**). Customs duties are included and Applicable Taxes are extra.

7.1.2 Canada's Total Liability – Professional Services

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____ (**insert the amount at contract award**). Customs duties are included and Applicable Taxes are extra.
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.

7.2 Limitation of Expenditure – Authorized Travel and Living Expenses

- 7.2.1 The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travelers", rather than those referring to "employees".

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

All payments are subject to government audit.

Estimated Cost: \$7,000.00.

7.2.2 Canada's Total Liability – Authorized Travel and Living Expenses

- 1. Canada's total liability to the Contractor under the Contract must not exceed \$ 7,000.00. Customs duties are included and Applicable Taxes are included.
- 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.

7.3 Limitation of Expenditure – Direct Expenses

7.3.1 For the Work described in the Statement of Work in Annex "A".

The Contractor will be reimbursed for the direct expenses mark-up as per Table "B" in Annex "B" Basis of Payment to a limitation of expenditure of \$_____ (*insert the amount at contract award*) Customs duty are included and applicable taxes are included.

7.3.2 Canada's Total Liability – Direct Expenses

1. Canada's total liability to the Contractor under the Contract must not exceed \$_____ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are included.
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:
 - c. when it is 75 percent committed, or
 - d. four (4) months before the contract expiry date, or
 - e. 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

7.4 Method of Payment

7.4.1 Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada; and
- c. the Work performed has been accepted by Canada.

7.5 Travel Time

Rates are inclusive of any time spent traveling from the Contractor's work location to a specific pre-authorized work assignment that is 100 kilometers or less.

Time spent by a Contractor traveling to and from specific pre-authorized work assignments where the distance is more than 100 kilometers from the Contractor's work location may be billed at 50% of the Contractor's per diem or hourly rate.

Where the time traveled is more or less than a day, per diem rates will be converted to hourly rates based on a 7.5 day when calculating reimbursement costs.

7.6 SACC Manual Clauses

A9117C (2007-11-30), T1204 – Direct Request by Customer Department
C0305C (2014-06-26) Cost Submission – Limitation of Expenditure or Ceiling Price
A9116C (2007-11-30) T1204 Information Reporting by Contractor
C0705C (2010-01-11) Discretionary Audit
A9033T (2012-07-16) Financial Capability
A7017C (2008-05-12) Replacement of Specific Individuals

7.7 Electronic Payment

Canada is phasing out cheques in favour of direct deposit by April 1, 2016. Therefore, all Canadians and Canadian businesses are encouraged to register for direct deposit as soon as possible to not miss the deadline. The electronic transfer allows Canada's payments to be deposited directly into a contractor's bank account. The Contractor is encouraged to register for Electronic Direct Payment (<http://www.aadnc-aandc.gc.ca/eng/1362499152985/1362499322435>) and to provide its account information upon request.

8. Certifications

8.1 Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

8.2 Aboriginal Business Certification

1. The Contractor warrants that its certification of compliance is accurate and complete and in accordance with the "Requirements for the Set-aside Program for Aboriginal Business" detailed in Annex 9.4 of the *Supply Manual*.
2. The Contractor must keep proper records and documentation relating to the accuracy of the certification provided to Canada. The Contractor must obtain the written consent of the Contracting Authority before disposing of any such records or documentation before the expiration of six (6) years after final payment under the Contract, or until settlement of all outstanding claims and disputes, under the Contract, whichever is later. All such records and documentation must at all times during the retention period be open to audit by the representatives of Canada, who may make copies and take extracts. The Contractor must provide all reasonably required facilities for any audits.

3. Nothing in this clause must be interpreted as limiting the rights and remedies which Canada may otherwise have pursuant to the Contract.

9. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

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 Articles of Agreement;
- (b) the supplemental general conditions 4009 (2013-06-27) Professional Services – Medium Complexity;
- (c) the general conditions 2010C (2014-09-25) Services (Medium Complexity);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the Contractor's bid dated (to be identified at contract award)

11. 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.

12. Official Languages

Any Contractor who carries out work on behalf of DIAND or Indian, Oil and Gas Canada (IOGC) in a location where the Department or Agency is required to provide services or communications to the public in both official languages, must also do so in both official languages. In DIAND, those locations are its regional offices located in Amherst, Quebec, the National Capital Region (NCR), Toronto, Winnipeg, Regina, Edmonton, Vancouver, Iqaluit, Yellowknife and Whitehorse and in IOGC, the Calgary regional office.

13. Joint Venture (If applicable)

- 13.1 The joint venture (the "Joint Venture") is comprised of the following members:

[List Joint Venture members]

- 13.2 _____ has been appointed as the "**Lead Member**" of the Joint Venture and has full authority to act as agent for each member of the Joint Venture with respect to all matters relating to the Contract;

- 13.3 By giving notice to the Lead Member, Canada shall be deemed to have given notice to all members of the Joint Venture;

- 13.4 The payment of moneys under the Contract to the Lead Member will act as a release from all the members of the Joint Venture;

13.5 Canada may, at its discretion, in the event of disputes among the members of the Joint Venture or changes in its composition, terminate the Contract; and

13.6 All members of the Joint Venture are jointly and severally or solidarily liable for the performance of the Contract.

14. T1204 - Information Reporting By Contractor

14.1 Pursuant to paragraph 221 (1)(d) of the Income Tax Act, R.S. 1985, c.1 (5th Supp.), 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 Government Service Contract Payments slip.

14.2 To enable departments and agencies to comply with this requirement, the Contractor must provide the following information within 5 calendar days following contract award:

- a. the legal name of the Contractor, i.e. the legal name associated with its business number or Social Insurance Number (SIN), as well as its address and postal code;
- b. the status of the Contractor, i.e. an individual, a sole proprietorship, a corporation, or a partnership;
- c. the business number of the Contractor if the Contractor is a corporation or a partnership and the SIN if the Contractor is an individual or a sole proprietorship. In the case of a partnership, if the partnership does not have a business number, the partner who has signed the Contract must provide its SIN;
- d. in the case of a joint venture, the business number of all parties to the joint venture who have a business number or their SIN if they do not have a business number.

14.3 The information must be sent to the person and address specified below. If the information includes a SIN, the information should be provided in an envelope marked "protected".

Name of person _____

Address _____

ANNEX "A"

STATEMENT OF WORK

Event and Travel Planning Management

SW1 BACKGROUND

Environmental challenges raised by Canadian Aboriginal communities associated with mining development activities can impair the ability of mining companies to gain and maintain their "social license" to operate from these communities. This situation can impact the short- and long-term prosperity and competitiveness of Canada's economy. It is therefore crucial to work towards addressing these challenges and demonstrate that the development of green mining technologies, processes and knowledge (e.g., NRCan-led Green Mining Initiative) and overall sustainable environmental management are contributing to improving the mining sector's performance. The NRCan-led Green Mining Initiative helps reduce the environmental impacts of mining through footprint reduction, innovation in waste management, mine closure and rehabilitation, as well as providing ecosystem risk management.

Aboriginal companies can play an active and positive role in addressing these challenges and the persistent views that mining cannot be done without negative impacts on the environment. As Aboriginal companies increase their involvement in environmental management and knowledge of innovative green mining technologies and practices, Canadian communities will gain increased trust and confidence in both these Aboriginal companies and the industry as a whole. Therefore, by taking a proactive approach, such as organizing learning workshops, Aboriginal companies can support responsible mineral development across Canada.

Procurement challenges raised by Canadian Aboriginal communities and businesses with the federal government and private sector can affect the ability of these communities and business in reaching full economic development opportunities. This can impact the short- and long-term prosperity and competitiveness of Canada's economy. It is therefore crucial to work towards addressing these challenges and demonstrate that the development of evolving procurement strategies and policies are contributing to improving the involvement of Aboriginal communities and businesses in federal private sector procurement. The Procurement Strategy for Aboriginal Business policy helps increase Aboriginal participation in procurement activities through intervention, education, promotion, marketing and outreach endeavours. The Procurement Strategy for Aboriginal Business policy has been in place since 1996 and the 2009 Federal Framework for Aboriginal Economic Development mentioned the policy as a key element in Aboriginal economic development. It also encourages AANDC to undertake research in strengthening Aboriginal procurement.

Aboriginal companies, organizations and institutions can play an active and positive role in addressing these procurement challenges. As Aboriginal companies increase their involvement in procurement activities, their participation will increase economic development not only for Aboriginal communities but also for all Canadians. Canadian communities will gain increased trust and confidence in these Aboriginal companies. Therefore, by taking a proactive approach, such as organizing learning workshops and policy development roundtables, Aboriginal companies can contribute to the development of strategies to improve, strengthen and support federal and private sector procurement involvement across Canada.

The Aboriginal Entrepreneurship Branch within Lands and Economic Development Sector requires the provision of event management services for the delivery of Workshops/Roundtables Supporting Aboriginal Businesses in the Green Mining Sector and the Aboriginal Procurement Sector. The Workshops/Roundtables will run from January 2015 to March 2015.

SW2 OBJECTIVE:

The Contractor will be involved in the organization and implementation of successful Workshops/Roundtables Supporting Aboriginal Businesses in the Green Mining Sector and the Aboriginal Procurement Sector. The Workshops/Roundtables objectives are:

1. Raise awareness and transfer leading-edge knowledge and best practices in innovative green mining technologies to Aboriginal companies,
2. Increase the number of Aboriginal business opportunities in innovative green mining technologies and related sustainable environmental management.
3. Explore/discuss/strategize areas of improvement and develop policy options and recommendations for the way forward for Aboriginal procurement in Canada.
4. Increase Aboriginal participation in federal and private sector contracting.

SW3 SCOPE OF WORK:

The Contractor will consult with to the Project Authority at Aboriginal Entrepreneurship Branch within Lands and Economic Development Sector and provide the following services related to the Workshops/Roundtables supporting Aboriginal Businesses in the Green Mining Sector (total of 5 workshops/roundtables with 25 participants per workshop/roundtable) and the Aboriginal Procurement Sector (total of 1 workshop/roundtable with 25 participants for the workshop/roundtable):

a) **Consultation and Project Management**

- The contractor will participate in regularly scheduled one hour weekly meetings to ensure all logistical and participant travel needs have been executed for the workshops/roundtables.
- Provide ongoing communication by email and phone regarding the progress of the engagement events.

- Provide critical path, detailed tasks, responsibilities and deadlines for all the scheduled workshops/roundtables, including budget updates.
- Prepare, deliver, facilitate and report on the outcomes of six (6) workshops/roundtables in selected provinces and territories i.e., Northern Quebec, Northern Ontario, Northern Saskatchewan, Northern British Columbia and Northwest Territories supporting Aboriginal businesses in the green mining sector; and,
- Prepare for a summary report in writing for each workshop/roundtable and a final report in writing summarizing the outcomes of the six (6) workshops/roundtables. The workshops/roundtables will include presentations and discussions on business-oriented leading-edge green mining technologies and best practices and/or Aboriginal procurement in the federal and private sector by representatives from:
 1. Federal government scientific research labs/centres (e.g., CanmetMINING; Canada Mining Innovation Council; Sustainable Development Technologies Canada);
 2. Provincial and territorial mining associations and or companies promoting/utilizing green mining technologies and practices;
 3. Aboriginal companies who are providing environmental management/consulting services and or supplying green mining equipment and technologies to exploration and mining companies;
 4. Provincial and territorial scientific research labs/centres.
 5. Federal government procurement experts (i.e. Public Works and Government Services Canada, Industry Canada, National Defence)
 6. Provincial government (i.e. Aboriginal Affairs)
 7. Aboriginal associations (i.e. National Aboriginal Capital Corporation Association - NACCA, National Aboriginal Economic Development Board - NAEDB)

b) Logistical Requirements for Facility

The contractor must:

- Source and pay for an appropriate facility with meeting space that is: wheel chair accessible including washroom facilities; centrally located with reasonable access to public transit and parking; and, is able to accommodate the number of planned participants.
- The contractor will liaise with the facility to coordinate accessibility and special need requirements of participants, including special dietary needs.
- The contractor will make arrangements to ensure the meeting space has the appropriate audio visual arrangements; meeting space configuration; translation equipment; and can accommodate Aboriginal cultural practices such as smudging, if required.
- Be fully responsible for ensuring that all set-up, technical and logistical aspects of the workshops/roundtables are efficiently met and provided.
- The contractor will provide a listing of on-site facility manager and event staff to the project authority in advance of the engagement meeting with their full contact information.

c) Hospitality

- Source and pay for any required hospitality for event participants in accordance with the requirements outlined in the Treasury Board Directive on the Management of Expenditures on Travel, Hospitality and Conferences <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228§ion=text>

d) **Service and Cultural Providers**

- Source and pay for an Elders including a small culturally appropriate gift, if requested, who will be identified by the project authority.
- Liaise with PWGSC simultaneous translation services.

e) **Financial Management - Travel Arrangements and Reimbursement**

- The project authority will provide the contractor with a listing of travellers for each engagement event.
- The contractor will contact and issue each traveller a standardized travel letter of agreement that will state the travel dates the participant is entitled to claim travel reimbursement in accordance with the *Treasury Board Travel Directive* (<http://www.njc-cnm.gc.ca/directive/travel-voyage/s-td-dv-a3-eng.php>). The travel letter of agreement will state any travel limitations and indicate that no professional fees shall be paid under the agreement.
- The contractor will be required to seek the agreement and signature of the traveller in advance of the travel day.
- The contractor's travel letter of agreement will request the traveller provide an invoice, attaching original receipts, for reimbursement. The contractor will indicate the address for submitting the travel claim for reimbursement.
- The contractor will make reasonable efforts to follow-up with the traveller to reimburse all eligible expenses under the Treasury Board Travel Directive in accordance with the days that were identified on the Travel Letter of Agreement. The contractor will be responsible for making three follow up attempts.

f) **Expected Outcomes**

- Increased number of Aboriginal businesses in sustainable environmental management and as providers of consulting services and suppliers of green mining equipment and technologies to exploration and mining companies to assist them obtain their "social licence" to operate.
- Canadian Aboriginal communities are more receptive to mining development as they have greater trust and confidence in Aboriginal companies providing sustainable environmental management practices and as providers of consulting services and suppliers of green mining equipment and technologies.
- Position Canada's mining sector as a global leader in the implementation of green mining technologies and practices through the engagement and contribution of Aboriginal businesses.
- Contributing to branding Canada's mining sector as environmentally responsible and sustainable by raising awareness of innovative environmental technologies to Aboriginal companies.
- Strategy that outlines how to increase Aboriginal community and business participation in federal and private sector procurement.
- Increase economic development in all Aboriginal communities across Canada.

SW4 OUTPUT:

Specific outputs and service requirements may include, but are not limited to, any combination of the following:

Event Planning

- Event logistics
- Securing hospitality
- Sourcing service providers, upon request
- Event budgeting
- Contacting travellers, issuing travel letter of agreements and providing travel reimbursement

Event Support

- Source, upon request, and pay all service and cultural providers.
- Venue / location identification.
- Off-site logistics.

Financial Management

- Issue participant travel letters.
- Follow up with participants for reimbursement (three times).
- Payments to reimburse travellers.
- Payments for service and cultural providers.
- Detailed invoices, including itemized listing of any sub-contracted services/resources; and
- Status updates of overall budget.

SW5 DEPARTMENTAL SUPPORT:

The project authority will work provide the contractor with the following information:

- Listing of all travellers.
- Provide the dates, city and time of workshops/roundtables.
- Provide names of service and cultural providers.

The contract authority and contractor will sit on a coordinating working group to ensure the successful coordination and implementation of the engagement events.

SW6 LOCATION OF WORK

The event planner will not be attending any workshops/roundtables; all duties will be conducted off-site.

SW7 GREENING GOVERNMENT OPERATIONS

Canada is committed to greening its supply chain. In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to acquire products and services that have a lower impact on the environment than those traditionally acquired. Environmentally preferable goods and services are those that have a lesser or reduced impact on the environment over the life cycle of the good or service, when compared with competing goods or services serving the same purpose. Environmental performance considerations include, among other things: the reduction of greenhouse gas emissions and air contaminants; improved energy and water efficiency; reduced waste and support reuse and recycling; the use

of renewable resources; reduced hazardous waste; and reduced toxic and hazardous substances.

Furthermore, in June 2008 the Federal Sustainable Development Act was passed to provide the legal framework for developing and implementing a Federal Sustainable Development Strategy that will make environmental decision making more transparent and accountable to Parliament. A Federal Sustainable Development Strategy is developed every three years that includes shrinking the environmental footprint of government operations. Green procurement is a key enabler of these objectives.

In accordance with the Policy on Green Procurement and Federal Sustainable Development Strategy, for this requirement:

General

- a) The Contractor is encouraged to offer or suggest green solutions whenever possible.
- b) The Contractor should consider the complete lifecycle of products and services provided to favor strategies, processes, and materials that assure sustainable development.
- c) The Contractor should use green meetings practices when conducting workshops and meetings. Guides to green meeting practices are available through Environment Canada and the United Nations Environment Program.

Travel

- a) The Contractor is encouraged to work off-site to reduce commuting requirements where security requirements allow.
- b) The Contractor is encouraged to use video and/or teleconferencing where possible to cut down unnecessary travel.
- c) Where transportation is required, the Contractor is encouraged to use environmentally preferred modes of transportation, where feasible.
- d) The Contractor is encouraged to use accommodations with environmental ratings: Contractors of the Government of Canada may access the PWGSC Accommodation Directory to search for accommodations with Green Key and/or Green Leaf ratings that will honor the pricing for Contractors.

Paper Consumption

- a) The Contractor is requested to provide all correspondence including (but not limited to) their bid, documents, reports and invoices in electronic format unless otherwise specified by the Contracting Authority or Project Authority, thereby reducing printed material. Should printed material be required, double sided printing in black and white format is the default unless otherwise specified by the Contracting Authority or Project Authority.
- b) Printed material is requested on paper that is EcoLogo certified or equivalent, certified as using fibre originating from a sustainably managed forest and/or minimum recycled content of 30%. Paper is also to be processed chlorine free, whenever possible.
- c) The Contractor should recycle (shred) unneeded copies of non-classified/secure documents (taking into consideration the Security Requirements).

SW8 Typical Agenda (examples of a workshop session)**Example 1**

8:00 – 9:00	Light breakfast (to be provided on site) and networking
9:00 - 9:15	Welcoming - Introductory Remarks by AANDC and NRCan Representatives (Overview and Objectives of the Session)
9:15 - 9:30	Aboriginal Business in Business in Green Mining - Key Finding of the Draft Compendium (AANDC)
9:30 am - 10:15	Presentations (approximately 30 -35 minutes by presentation, including Q&A) 1) Video - The Green Mining Initiative (10 minutes) (NRCan) 2) The Green Mining Initiative - Overview Presentations and Potential Business Opportunities (NRCan) 3) Canada Mining Innovation Council and/or Sustainable Development Technologies Canada
10:15 - 10:30	Health Break
10:30 - 12:00	Presentations - cont'd (approximately 30 – 45 minutes by presentation, including Q&A)
12:00 - 13:00	Light lunch (to be provided on site)
13:00 - 15:30	Presentations - cont'd (approximately 30 - 45 minutes by presentation, including Q&A) 4) A provincial/territorial mining association and/or a mining company representative utilizing green mining technologies and practices 5) A provincial/territorial scientific research lab representative 6) An Aboriginal company representative providing environmental management/consulting services to mining companies
15:30 -15:45	Health Break
15:45 -17:00	Round Table Discussions (based on 2-3 questions) - E.g., How do we create greater awareness for the Green Mining Initiative among Aboriginal businesses? - E.g., How can Aboriginal companies benefit from business opportunities in the green mining sector?
17:00	Conclusion

Example 2

8:00 – 9:00	Meet and Greet – Networking Opportunity
9:00 - 9:15	Welcoming - Introductory Remarks by AANDC Representatives (Overview and Objectives of the Session)
9:15 - 9:30	Federal Procurement with Aboriginal Businesses
9:30 am - 10:15	Presentations (approximately 30 -35 minutes by presentation, including Q&A) 1) NACCA Presentation 2) Presentation by an Aboriginal Financial Institution 3) Presentation by PWGSC
10:15 - 10:30	Health Break
10:30 - 12:00	Presentations - cont'd (approximately 30 – 45 minutes by presentation, including Q&A)
12:00 - 13:00	Lunch Break and Networking
13:00 - 15:30	Presentations cont'd/Panel Discussion -(approximately 30 - 45) 3) Presentation from Provincial representative of Aboriginal Affairs 4) Federal representatives from OGDs 5) Aboriginal associations/institutions

15:30 -15:45
15:45 -17:00

Health Break

Round Table Discussions (based on 2-3 questions)

- E.g., How do we create greater awareness for Aboriginal procurement in the public and private sector?

- E.g., How can Aboriginal companies and communities increase their economic development through procurement with the public and private sector?

17:00

Conclusion

ANNEX "B"**BASIS OF PAYMENT**

During the period of the Contract, payment for the satisfactory performance of the work under this Contract shall be based on firm all inclusive per diem rates for actual work performed and a mark-up rate for direct expenses event as detailed below.

All of the information required in this section **MUST** appear in the Bidder's Financial Proposal **ONLY**.

Failure on the part of the Bidder to provide the information required within the Financial Proposal Tables will result in DIAND deeming the Bidder's Proposal to be non-compliant with the Proposal being given no further consideration by DIAND.

The Bidder's Financial Proposal **MUST** be submitted separate from the Bidder's Technical Proposal.

Event Expenses**TABLE A**

	PERIOD	PER DIEM RATE (in Cdn \$)	LEVEL OF EFFORT	TOTAL (in Cdn \$)
	Upon Contract Award to March 31, 2015			
		A	B	C = AXB
1	One (1) Event Manager			
2	One (1) Financial Manager			
3	One (1) Event Coordinator			
	Subtotal			
	GST/HST extra			

1.3 Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\frac{\text{Hours worked} \times \text{applicable firm per diem rate}}{7.5 \text{ hours}}$$

- a. All proposed personnel must be available to work outside normal office hours during the duration of the Contract.
- b. No overtime charges will be authorized under the Contract. All time worked will be compensated according to paragraph above.

TABLE B

The Bidder must quote a mark-up on direct expenses as a percentage. An estimate of the direct expenses for the requirement has been provided below which is in accordance with the Statement of Work at Annex "A". This estimate of direct expenses mark-up will form the Limitation of Expenditure for Direct Expenses in any resulting contract.

Estimated of Anticipated Cost for Direct Event Expenses (\$CAD)	
Type of Cost	Cost (A)
a) Travel for all participants: (including 5% tax)	\$45,000.00
b) Accommodation: (Room rental-12 days)	\$26,000.00
c) Miscellaneous Expenses (Elder Fees/gift etc.):	\$1000.00
d) Hospitality	\$65,800.00
Estimated Direct Expenses	\$137,800.00
Firm All-inclusive Direct Expense Mark-up	%
Total Estimated for Direct Expenses with Mark-up (applicable taxes included)	

TABLE C**Total Evaluated Price**

	PERIOD	PER DIEM RATE (in Cdn \$)
	Upon Contract Award to March 31, 2015	
1	Total of Table A (Contractor's fees and level of effort) Including Taxes	
2	Total of Table B (Estimated of Anticipated Cost for Direct Event Expenses – Including Taxes	
3	Contractor's Travel not to exceed (including 5% tax)	\$7,000.00
	TOTAL	