

Privy Council Office Bureau du Conseil privé

Return Bids to / Retourner les soumissions à:

Privy Council Office/Bureau du Conseil privé Mail Reception Area/Salle de réception de courrier 11 rue Metcalfe Street Ottawa, Ontario K1P 5K9

Request For Proposals / Demande de Proposition

Proposal To: Privy Council Office

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

Proposition aux: Bureau du Conseil privé

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

Comments - Commentaires

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

Issuing Office - Bureau de distribution

Procurement and Contracting Services/ Service des acquisitions et des contrats 90 Sparks, Room/pièce 800 Ottawa, Ontario (Canada) K1A 0A3

Title / Sujet

Examining the Canadian and United States Rule-Making

Solicitation No. - No de l'invitation

Date

50022-14

2015-05-14

Client Reference No. - No de référence du client

N/A

Solicitation Closes – L'invitation prend

Time Zone Fuseau horaire

at – 2:00 PM on – 2015-07-10 Eastern Daylight Time (EDT)

FOB-FAB

Destination

Address Enquiries to: - Adresser toutes questions à:

Kim McKortel

Email Address - Courriel

Fax No. - No de Fax

kim.mckortel@pco-bcp-gc.ca

613-947-0484

Destination of Goods, Services and Construction: Destinations des biens, services et construction :

See Herein/Voir aux présentes

Instructions : See Herein Instructions : Voir aux présentes

Delivery Required -Livraison exigée

Delivery Offered -Livraison proposée

See Herein/Voir aux présentes

Vendor/Firm Name and Address

Raison sociale et adresse du fournisseur/de l'entrepreneur

Telephone No. - N° de telephone Facsimile No. - N° de télécopieur

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)

Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature

Date



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PART 1 - GENERAL INFORMATION

1. Introduction

The bid solicitation is divided into six parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include the Pricing Schedule and the Mandatory and Point-Rated Technical Criteria.

The Annexes include the Statement of Work, Basis of Payment and Security Requirements Checklist.

For services requirements, Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

2. Summary

The Privy Council Office (PCO) has a requirement for a Contractor to conduct research outlining and examining the stages of rule-making, policies, statutes, and conventions associated with Canada and the United States respective regulatory and rule making process in the context of regulatory cooperation and alignment.

The contract period is estimated to be nine (9) months from contract award.

3. Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should 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.

4. Office of the Procurement Ombudsman

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at boa.opo.gc.ca. You can also obtain more information on the OPO services available to you at their website 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 <u>Standard Acquisition Clauses and Conditions Manual</u> (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 <u>2003</u> (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 modifications:

- <u>Section 01, Integrity Provisions-Bids</u>, is deleted in its entirety and replaced with: Bidders must comply with the <u>Code of Conduct for Procurement</u> (http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/index-eng.html).
- Section 02 Procurement Business Number, is deleted in its entirety.

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Section 05 – Subsection 5.4 is amended as follows:

Delete: sixty (60) days Insert: ninety (90) days

Section 06 – Late Bids is amended as follows:

Delete: PWGSC Insert: PCO

Section 07 – Delayed Bids is amended as follows:

Delete: PWGSC Insert: PCO

2. Submission of Bids

Bids must be submitted to the Privy Council Office by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted electronically or by facsimile to PCO will not be accepted.

3. Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, 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 <u>Public Service Superannuation Act</u> (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the <u>Supplementary Retirement Benefits Act</u>, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the <u>Canadian Forces Superannuation Act</u>, R.S., 1985, c. C-17, the <u>Defence Services Pension Continuation Act</u>, 1970, c. D-3, the <u>Royal Canadian Mounted Police Pension Continuation Act</u>, 1970, c. R-10, and the <u>Royal Canadian Mounted Police Superannuation Act</u>, R.S., 1985, c. R-11, the <u>Members of Parliament Retiring Allowances Act</u>, R.S. 1985, c. M-5, and that portion of pension payable to the <u>Canada Pension Plan Act</u>, 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 FPSs 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 <u>Contracting Policy Notice: 2012-2</u> 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 five (5) business days before the bid closing date. Enquiries received after that time may not be answered. Business days are defined as Monday to Friday.

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.

6. Maximum Funding

The maximum funding available for the Contract resulting from the bid solicitation is \$70,000.00 CAD (Applicable Taxes are extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (four (4) hard copies and one (1) soft copy on CD)

Section II: Financial Bid (one (1) hard copy)
Section III: Certifications (one (1) hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process <u>Policy on Green Procurement</u> (http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

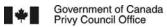
Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying 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

- 1.1 Bidders must submit their financial bid in Canadian funds and in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.
- 1.2 The Bidder's proposed firm price in response to this RFP and resulting contract must include custom duties, all overhead, general & administrative costs and profit. The firm price also includes the following costs that may be incurred in providing the required services: office space, computer hardware and software, word processing, preparation of reports, photocopying, courier services, facsimile services, telephone services, all travel expenses.



1.3 Exchange Rate Fluctuation

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

ATTACHMENT 1 TO PART 3 PRICING SCHEDULE

The Bidder must complete this pricing schedule and include it in its financial bid once completed.

Canada's total liability to the Contractor under the Contract shall not exceed \$70,000.00 CAD. All price proposals exceeding this value will render the bidder's proposal non-responsive.

DESCRIPTION OF SERVICES	TOTAL ALL-INCLUSIVE FIRM PRICE (APPLICABLE TAXES EXCLUDED)
Examining the Canadian and United States Rule-Making Processes	

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

An evaluation team composed of representatives of Canada will evaluate the bids.

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4

1.1.2 Point-Rated Technical Criteria

Refer to Attachment 1 to Part 4

1.2 Financial Evaluation

Only the proposals that are technically responsive will be considered for financial evaluation. The price of the bid will be evaluated in Canadian dollars, Applicable Taxes are extra. For the purposes of bid evaluation, Attachment 1 to Part 3 Pricing Schedule will be used. The Bidder must provide all an inclusive firm price for services being proposed in accordance with the bid solicitation, for the duration of the contract.

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. obtain the required minimum of 98 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 140 points.
- 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 (Attachment 1 to Part 3) does not exceed the budget available for this requirement.
- 3. If there is more than one bidder having the highest number of points, the Bidder with the lowest total evaluated price (Attachment 1 to Part 3) will be recommended for award of a contract. If there is more than one bidder having the highest number of points and the same total evaluated price (Attachment 1 to Part 3), the Bidder who achieved the highest point-rated score for R1 criteria will be recommended for award of a contract.

ATTACHMENT 1 TO PART 4 MANDATORY AND POINT-RATED TECHNICAL CRITERIA

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The information provided by the Bidder in this RFP will be assessed according to the mandatory and point-rated criteria listed below.

At bid closing, the Bidder must demonstrate **BEYOND ANY DOUBT** that the information provided complies with and meets the requirements set out in this solicitation and as outlined under the evaluation criteria.

Where a criterion specifies a timeframe (e.g. "within the last five (5) years"), the Solicitation closing date is the point of reference. Experience acquired or project completed before the specified timeframe will not be considered.

Bidders are requested to provide a start date, end date, and reference (name, title, telephone number and email address) for each experience or project used to respond to a criterion.

Failure on the part of the Bidder not meeting a mandatory criterion will result in the proposal being deemed non-compliant and no further consideration will be given.

Definition of "at least" or "minimum": the minimal expectation for a requirement. No points will be given if the minimal expectation is not demonstrated.

MANDATORY TECHNICAL CRITERIA

	Experience of the Bidder	Met	Not met	Cross-Reference From Relevant Experience From Proposal and/or CV
M 1	The Bidder must have completed at least one project in the past five years, involving research and analysis of the Canadian regulatory process AND at least one project in the past five years involving research and analysis of the U.S. rule-making process. In responding to this criterion, the Bidder may submit a single project that involves BOTH research and analysis of the Canadian regulatory process AND research and analysis of the U.S. rule-making process (e.g., comparing and contrasting). To meet this criterion, the project(s) cited must have included at least one of the resources proposed for this RFP.			

POINT-RATED TECHNICAL CRITERIA

	Experience of the Bidder	Maximum Points Available	Points Obtained	Cross-Reference From Relevant Experience From Proposal and/or CV
R1	The Bidder should have experience in conducting research and analysis in the past five years involving the Canadian and/or U.S. regulatory process, including the statutory and policy environment under which regulators operate. An additional 20 points will be awarded if the Bidder can demonstrate experience providing research and analysis comparing/contrasting the Canadian and U.S. regulatory processes. To meet this criterion, only projects that include the experience of at least one of the resources proposed for this RFP will be considered for evaluation purposes.	Maximum points available: 60 pts 2 projects: 20 pts 3 projects: 30 pts 4 or more projects: 40 pts Additional pts: 20 pts		
,	Understanding of the Requirement	Maximum Points Available	Points Obtained	Cross-Reference From Relevant Experience From Proposal and/or CV
R2	The Bidder should demonstrate an understanding of the complexity, objectives and scope of the project.	No information provided: 0 pts Poor/Limited: limited understanding; re-states information provided in Statement of Work: 1 to 10 pts Fair/Good: demonstrates a fair to good understanding of the complexity, objectives and scope of the project; elaborating on what is in the Statement of Work: 11 to-19 pts		

	Technical Approach	Excellent: very comprehensive understanding of the complexity, objectives and scope of the project: supported by use of external documents/studies/research: 20 to 25 pts	Points Obtained	Cross-Reference From Relevant Experience From
			Obtained	Proposal and/or CV
R3	Proposed approach and discussion of methodologies used for collecting data and conducting research towards ensuring project objectives will be met.	Poor/Limited: approach and discussion of methodologies used for collecting data and conducting research, lacking sufficient detail to demonstrate that project objectives will be met: 1 to 5 pts Fair/Good: approach and discussion of methodologies towards ensuring project objectives will be met: 6 to 10 pts Excellent: approach and discussion of methodologies used for collecting data and conducting research, demonstrating ample knowledge, insight and detail to ensure project objectives will be met: 11 to 15 pts		

	Project Management Methodology	Maximum Points Available	Points Obtained	Cross-Reference From Relevant Experience From Proposal and/or CV
R4	The Bidder should describe their project management approach and methodology to ensure quality and achievement of project objectives. The methodology should be supported by a proposed work plan and a level of effort and schedule that demonstrates a logical organization of tasks to be completed. The level of effort for each task should align with the purpose and scope of the methodology, as well as with the technical approach described in R3.	Poor/Limited: project management approach and methodology are limited; does not demonstrate a logical organization of tasks to be completed; with flaws that could compromise the quality of the project or achievement of project objectives: 1 to 5 pts Fair/Good: project management approach and methodology demonstrate a logical organization of tasks to be completed and their scheduling; with flaws that do not necessarily compromise the quality or achievement of project objectives: 6 to 10 pts Excellent: project management approach and methodology demonstrate ample knowledge, insight and detail to ensure project objectives will be met using a logical organization of tasks to be completed; with no flaws identified: 11 to 15 pts		CV

Exa Bide	mple of Written Work From the der	Maximum Points Available	Points Obtained	Cross-Reference From Relevant Experience From Proposal and/or CV
R5	The Bidder should provide an example of previous work on a research and analysis project of similar scope and complexity (e.g., a final report, interim report) to demonstrate the Bidder's written and analytical capabilities. To meet this criterion, only work examples that have been produced by, (or by a team that included) at least one of the resources proposed for this RFP will be considered for evaluation purposes.	Poor/Limited: work sample is overly technical, uses an inappropriate tone and level of detail for the audience, is not logically sequenced, does not demonstrate analytical rigour or soundness of conclusions/recommendations: 1 to 10 pts Fair/Good: work sample is easily understood, covers key points, uses an appropriate tone and level of detail for the audience, presents points in a reasonable sequence, demonstrates sound analysis and provides conclusions/ recommendations which flow from the evidence in the paper: 11 to19 pts Excellent: work sample is engaging and convincing to readers, thorough in its coverage of relevant issues, uses an appropriate tone and level of detail for the audience, is well-organized and logical in its flow, provides excellent or original analysis and evidence and provides convincing conclusions/ recommendations which flow logically from the evidence in the paper: 20 to 25 pts		
	Minimum Points Required – 98			
	TOTAL POINTS ACHIEVED			

PART 5 - CERTIFICATIONS - PRECEDENT TO CONTRACT AWARD

By submitting a bid, the Bidder certifies that the Bidder is in compliance with the following certifications.

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 in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, 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 and to cooperate with any request or requirement imposed by the Contracting Authority may render the bid non-responsive or constitute a default under the Contract.

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. Failure to comply with the request may result in the bid being declared non-responsive.

2. Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

1. Statement of Work

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

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2. Standard Clauses and Conditions

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

2.1 General Conditions

2035 (2014-09-25), General Conditions - Higher Complexity - Services, apply to and form part of the Contract with the following modifications:

• Section 01 – Interpretation is amended as follows:

Delete:

"Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Minister of Public Works and Government Services and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of Public Works and Government Services has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister;

And replace with:

"Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Minister responsible for the Privy Council Office and any other person authorized to act on behalf of that minister or, where the Minister of Public Works and Government Services has delegated his or her powers, duties or functions to the Minister responsible for the Privy Council Office, the minister or any other person duly authorized to exercise such powers.

Section 41 - Integrity Provisions – Contract is deleted in its entirety and replaced with:

Code of Conduct and Certifications: The Contractor certifies that it has read the <u>Code of Conduct for Procurement</u> and agrees to be bound by its terms (http://www.tpsgc-pwgsc.gc.ca/app-acq/cndt-cndct/conduite-conduct-eng.html).

2.2 Supplemental General Conditions

4006 (2010-08-16), Contractor to Own Intellectual Property Right in Foreground Information, apply to and form part of the Contract.

3. Security Requirement

The Contractor and/or its employees MUST, at all time, be escorted on the Privy Council Office and/or Prime Minister's Office premises by the Project Authority or by a suitable replacement appointed by the Project Authority.

The Contractor and/or its employees MUST NOT have access to any PROTECTED or CLASSIFIED information or assets from the identified work site(s).

(insert at contract award).

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The Contractor and/or its employees MUST NOT remove any PROTECTED or CLASSIFIED information or assets from the identified work site(s).

The Contractor and/or its employees MUST NOT use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data.

4.	Term of Contract
4.1	Period of the Contract
The pe	eriod of the Contract is from date of award to inclusive. (insert at contract award)
5.	Authorities
5.1	Contracting Authority
The Co	ontracting Authority for the Contract is:
Title: _ Organi	(or authorized representative)
Facsim	one: nile: address:
authori	ontracting Authority is responsible for the management of the Contract and any changes to the Contract must be ized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.
5.2	Project Authority
The Pr	oject Authority for the Contract is: (insert at contract award)
Title: _ Organi	(or authorized representative) zation: ss:
Facsim	one:nile: address:
Contra matters to the s	roject Authority is the representative of the department or agency for whom the Work is being carried out under the act and is responsible for all matters concerning the technical content of the Work under the Contract. Technical is may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by intracting Authority.
5.3	Contractor's Representative

6. Proactive Disclosure of Contracts with Former Public Servants (To be removed at contract award if not applicable)

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 <u>Contracting Policy Notice: 2012-2</u> of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex "B" for cost of \$ _____(insert at contract award). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.2 Method of Payment

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.3 SACC Manual Clauses

A9117C (2007-11-30), T1204 – Direct Request by Customer Department

8. Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Invoices must be distributed as follows:

 One (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

9. Certifications

9.1 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.

10. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____. (insert at contract award)

11. 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.

the Articles of Agreement; (a) the supplemental general conditions 4006 (2010-08-16), Contractor to Own Intellectual Property Rights in (b) Foreground Information:: the General Conditions 2035 (2014-09-25); Higher Complexity - Services (c) Annex "A", Statement of Work (d) Annex "B", Basis of Payment: (e) Annex "C", Security Requirements Checklist; (f) the Contractor's bid dated _____, (insert date of bid) (If the bid was clarified or amended, insert at the time of contract award:", as clarified on _____ " or ", as amended on _____ " and insert date(s) of clarification(s) or (g) amendment(s)). 12. Foreign Nationals (Canadian Contractor) (to be determined at contract award) SACC Manual clause A2000C _____ (insert date) Foreign Nationals (Canadian Contractor) OR 12. Foreign Nationals (Foreign Contractor)

13. 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.

SACC Manual clause A2001C (insert date) Foreign Nationals (Foreign Contractor)

14. Dispute Resolution Services

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

15. Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by the contractor respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

ANNEX "A" STATEMENT OF WORK

1. Title

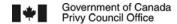
1.1 Examining the Canadian and U.S. Rule-Making Processes

2. Objectives

- 2.1 Under the U.S.-Canada Regulatory Cooperation Council (RCC), both countries are pursuing enhanced collaboration between regulatory departments and agencies and across multiple sectors. Announced by President Obama and Prime Minister Harper in 2011, this work includes many forms of cooperation, including mutual recognition of regulatory outcomes (e.g., regulations for the transport of dangerous goods), joint implementation of common standards (e.g., implementation of the globally harmonized system for the classification and labelling of chemicals), and undertaking work for or on behalf of the other party (e.g., marine safety inspections). To inform the consideration of how Canada and the U.S. might facilitate the alignment of regulations and synchronization of rule-making processes (in those cases when alignment and synchronization are mutually desired and beneficial), and in support of future efforts to avoid unnecessary misalignments from developing, this research will outline the Canadian and U.S. regulatory/rule-making processes, identify each stage and element of the respective processes, and examine whether and how each element impacts regulatory alignment and synchronization.
- 2.2 This research will further clarify the two countries' strong existing rule-making processes to better understand how they operate in parallel, and identify opportunities to maintain alignment through these processes. More specifically, the objective of this contract is to outline and examine the stages of rule-making, policies, statutes, and conventions associated with each countries' respective regulatory and rule making process in the context of regulatory cooperation and alignment.
- 2.3 This research will help inform the RCC's work with regulators and stakeholders to further enhance and institutionalize regulatory cooperation.

3. Background, Assumption and Specific Scope of the Requirement

- 3.1 The early stages of RCC work have identified that the Canadian and U.S. rule-making processes can impact regulatory cooperation and alignment. Because the two regulatory systems are independent and are based on unique systems of governance, statutory requirements, and rule-making policies and procedures, certain stages of each rule-making process can impact the ability to achieve alignment. For example, with respect to the rule-making process (as set out under the *Statutory Instruments Act* in Canada and the *Administrative Procedure Act* in the U.S.), the limitation on ex parte communication--after public comment periods have closed and agencies have initiated internal deliberations concerning the input—may constrain the ability of agencies to engage and collaborate on the development and implementation of a given rule.
- 3.2 Research is now required to better understand the respective rule-making processes, and the laws and policies that govern them, and how regulators might work more closely, or even jointly, and/or share information within the existing legal and administrative frameworks to further cooperation efforts. The research needs to increase common understanding of the U.S. and Canadian rule-making processes and include but not be limited to analysis of: commitments to international cooperation, commitments to Canada-U.S. cooperation, agenda setting, forward planning, pre-consultation drafting (including drafting techniques such as incorporation by reference), instrument choice, public consultations and related transparency mechanisms (including online platforms), regulatory impact analysis, use of standards, central agency review, post-consultation adjustments, final approvals and implementation.
- 3.3 When making or amending a rule or regulation, departments and agencies are guided by several authorities: overarching government-wide statutes, departmental enabling statutes, central-agency policy and guidance, department/agency-specific policy and guidance, or simply by convention. A central research challenge will be to clearly assess the current rule-making processes and their impact on regulatory cooperation, in order to determine where and how alignment and synchronization may be impacted.



4. Scope of Work

- 4.1 The Contractor must address the following issues:
 - 4.1.1 A description and analysis of the stages and steps of Canadian and U.S. rule-making processes, in which the key decision-points, steps and associated timelines are examined. Relevant legal and policy frameworks and their foundations should be identified, as well as identification of specific Canadian and U.S. regulatory policy commitments with respect to international cooperation and to Canada-U.S. cooperation in particular.
 - 4.1.2 An analysis of coordination opportunities or challenges, where each jurisdiction shares common regulatory objectives and a desire to align regulations (in timing and/or substance), with a view to describing how the respective Canadian and U.S. rule-making processes impact the ability to align. Where impacts are identified, determine if they are rooted in statutes, policies, guidelines, conventions, etc.
 - 4.1.3 An assessment of what key stages, in the respective country's regulation and rule-making processes, should be the focus of further research and exploration of ways to more effectively coordinate efforts in support of regulatory alignment, including the identification of existing statutes, regulations, policies or administrative procedures that could facilitate coordination in support of greater regulatory alignment.
- 4.2 In undertaking the analysis on the above-noted issues, the Contractor must:
 - 4.2.1 Engage with the Project Authority to produce an outline and proposed methodology for the study.
 - 4.2.2 Interview Canadian and U.S. federal regulators and their legal counsel, RCC staff, and others as required to develop a comprehensive understanding of the legal, policy and other instruments impacting regulatory alignment between Canada and the U.S.A.
 - 4.2.3 Review other information sources, including government documents (e.g., regulatory impact analysis statements) and available academic and third-party literature.
 - 4.2.4 Analyze the results, organize them, and present them in a format acceptable to the Project Authority. The analysis should cover all of the topics listed under the Scope above.

5. Deliverables

- 5.1 The Contractor must complete and submit the following deliverables to the Project Authority as follows:
 - 5.1.1 Initial discussion: the Contractor will have a discussion with the Project Authority to confirm objectives, scope, methodology, deliverables, and timeframes. 1 week after contract award.
 - 5.1.2 Work plan and draft table of contents: A schedule of deliverables including description of the proposed methodology and a presentation of an outline of the final report. 4 weeks after contract award.
 - 5.1.3 Interim report: reflecting work completed to date, including preliminary results from analysis. The Project Authority will provide feedback on this interim report within two weeks of its receipt. 16 weeks after contract award.
 - 5.1.4 Draft final report: The Contractor must submit a draft version of the final report for review and input by the Project Authority. The Project Authority will provide feedback on the draft final report within two weeks of its receipt. 22 weeks after contract award.
 - 5.1.5 Final report reflecting feedback received from the Project Authority. 26 weeks after contract award.
- 5.2 The draft and final reports must be delivered in English.

6 Language Requirement

6.1 The Contractor must be able to provide the services in English.

7. Project Management

- 7.1 Oversight of the project will be undertaken by the Canada-US Regulatory Cooperation Council Secretariat in the Privy Council Office of the Government of Canada in consultation with the US RCC Secretariat in the Office of Information and Regulatory Affairs (Executive Office of the President).
- 7.2 The Contractor must consult regularly with the RCC Secretariat in Ottawa to provide updates on the progress of their work.
- 7.3 The RCC secretariats will provide the Contractor with appropriate contacts / introductions to federal regulators that could provide useful background on the issues to be addressed in this contract.

8. Location of Work and Travel Requirements

8.1 The Project Authority is located in Ottawa. The Contractor may conduct the work remotely. The Contractor will be responsible for providing own work facilities, and any resources relating to the conduct of this project, including travel, if required.

9. Reference Material

9.1 For more details on the RCC, including key publications, please visit http://actionplan.gc.ca/en/page/rcc-ccr/regulatory-cooperation-council. Interested bidders are encouraged to review the RCC Joint Forward Plan (2014), RCC Joint Action Plan (2011) and RCC Terms of Reference (2011).

ANNEX "B" BASIS OF PAYMENT

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

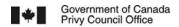
MILESTONE PAYMENTS

MILESTONES	FIRM PRICE (percentage based)
Milestone #1 - upon completion and approval of the following deliverables: 5.1.1 Initial discussion; and 5.1.2 Work plan and draft table of contents	10% \$ (insert at contract award)
Milestone #2 - upon completion and approval of the following deliverable: 5.1.3 Interim report	30% \$ (insert at contract award)
Milestone #3 - upon completion and approval of the following deliverable: 5.1.4 Draft final report	30% \$ (insert at contract award)
Milestone #4 - upon completion and approval of the following deliverable: 5.1.5 Final report	30% \$ (insert at contract award)
TOTAL FIRM PRICE (Applicable Taxes excluded)	

ANNEX "C" SECURITY REQUIREMENTS CHECKLIST

Contract Number / Numéro du contrat

of Canada du Canada	,		50022-14	
		Security C	lassification / Classification de	sécurité
•	ECURITY REQUIREMEN	TE CHECK I IST (SBC		
LISTE DE VÉRIFI	CATION DES EXIGENCE	S RELATIVES À LA S	L) ÉCURITÉ (LVERS)	
PART A - CONTRACT INFORMATION / PARTIE A	 INFORMATION CONTRACT 	TUELLE		
Originating Government Department or Organizati Ministère ou organisme gouvernmental d'origine			or Directorate / Direction génér	
3. a) Subcontract Number / Numéro du contrat de so		me and Address of Subco	tory Cooperation Council Secre ntractor / Nom et adresse du so	etariat/Secrétariat dud ous-traitant
Brief Description of Work / Brève description du tr.				
Examining the Canadian and United States Rule-Making				
Examen des processus d'établissement de règlements	du Canada et des États-Unis			
a) Will the supplier require access to Controlled G Le fournisseur aura-t-il accès à des marchandis				No Yes
b) Will the supplier require access to unclassified		to the provisions of the T	echnical Data Control	Non L Oui
Regulations?				Non Oui
Le fournisseur aura-t-il accès à des données te sur le contrôle des données techniques?		fiées qui sont assujetties :	aux dispositions du Règlement	
Indicate the type of access required / Indiquer le t	ype d'accès requis			
6. a) Will the supplier and its employees require acce				/ No Yes
Le fournisseur ainsi que les employés auront-ils (Specify the level of access using the chart in Q		s ou à des biens PROTÉG	BÉS et/ou CLASSIFIÉS?	Non L Oui
(Préciser le niveau d'accès en utilisant le tablea	u qui se trouve à la question	7. c)		
b) Will the supplier and its employees (e.g. cleane PROTECTED and/or CLASSIFIED information	rs, maintenance personnel) r	equire access to restricted	access areas? No access to	No Yes
Le fournisseur et ses employés (p. ex. nettoyeu	rs, personnel d'entretien) aur	ont-ils accès à des zones	d'accès restreintes? L'accès	☐ Non ☑ Oui
à des renseignements ou à des biens PROTÉG 6. c) Is this a commercial courier or delivery requirem				✓ No Yes
S'agit-il d'un contrat de messagerie ou de livrais	son commerciale sans entrep	osage de nuit?		V No Yes Oui
7. a) Indicate the type of information that the supplier	will be required to access / I	ndiquer le type d'informati	on auquel le fournisseur devra	avoir accès
Canada	NATO / OTAN		Foreign / Étranger	
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			-	Security Classific	ation / Classification	n de sécurité
8. Will the sup	inued) / PARTIE A	(suite) s to PROTECTED and/or CL	ASSIFIED COMSEC in	formation or assets?		No Yes
Le fournisse	eur aura-t-il accès à	des renseignements ou à d	des biens COMSEC dé	signés PROTÉGÉS et/ou CLA	SSIFIÉS?	Non Oui
	ate the level of sen native, indiquer le r	sitivity: liveau de sensibilité :				
		to extremely sensitive INFO				✓ No Yes
Le fournisse	eur aura-t-ii acces a	i des renseignements ou a d	les biens INFOSEC de	nature extrêmement délicate?		Non L Oul
	i) of material / Titre lumber / Numéro d	(s) abrégé(s) du matériel :				
PART B - PER	SONNEL (SUPPL	IER) / PARTIE B - PERSON	INEL (FOURNISSEUR			
10. a) Personn	el security screenir	ng level required / Niveau de	contrôle de la sécurité	du personnel requis		
	RELIABILITY ST.		NFIDENTIAL	SECRET	TOP SE	CRET
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	SITE ACCESS ACCÈS AUX EM	PLACEMENTS				
	Special comment	e.				
	Commentaires sp		equired/Aucune cote de	sécurité requise		
				ation Guide must be provided. iis, un quide de classification d	le la cécurité doit ô	tro fourni
	creened personnel	be used for portions of the v	work?		ic la scealite doit e	No / Yes
		ation sécuritaire peut-il se voi	ir confier des parties di	ı travail?		Non V Oui
		sonnel be escorted? nnel en question sera-t-il esc	corté?			No V Yes Oui
				/FOURNISOSUR)		
		LIER) / PARTIE C - MESUR RENSEIGNEMENTS / BIEN		(FOURNISSEUR)		
11. a) Will the premise		d to receive and store PROT	TECTED and/or CLASS	SIFIED information or assets or	n its site or	✓ No Yes
		de recevoir et d'entreposer	sur place des renseigr	nements ou des biens PROTÉ	GÉS et/ou	inon Light
CLASSI	FIÉS?	,				

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PRODUCTION

11. b) Will the supplier be required to safeguard COMSEC information or assets? Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

Security Classification / Classification de sécurité

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises? Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

Canadä

Non Yes Oui

Contract Number / Numéro du contrat

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IT Media / Support TI IT Link /																	
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attachr Dans l' « Class	ments (e 'affirma	e.g. tive n d	SE, cla e sé	CRE Issif	by annotating T with Attach fier le présent ité » au haut d	ments). I formulai	ire en ind	liquant le niv	reau de sécu	rité dans	la case ir	ntitul	ée				

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Security Classification / Classification de sécurité

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