

**RETURN BID TO/ RETOURNER LES SOUMISSIONS À :**

[itservices.aaci@international.gc.ca](mailto:itservices.aaci@international.gc.ca)

**Department of Foreign Affairs, Trade and Development (DFATD)**

Ministère des Affaires étrangères du Commerce et du Développement (MAECD)

**Request for Proposal**

**Demande de proposition**

**proposal to:** Department of Foreign Affairs Trade and development

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 here to, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition à:** Ministère des Affaires Étrangères du Commerce et du Développement

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 appendices ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments — Commentaires :**

**THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT — LE PRÉSENT DOCUMENT COMPORTE UNE EXIGENCE EN MATIÈRE DE SÉCURITÉ**

**Issuing Office – Bureau de distribution**

Foreign Affairs, Trade and **Development** / Affaires étrangères, Commerce et Développement  
 It Contracting Services Unit / Unité des services de contrats  
 125 Sussex Drive,  
 Ottawa, Ontario

<b>Title — Sujet: Connect to Canada</b>	
Solicitation No. — N° de l'invitation 15-93622	Date: 2015-06-05

Solicitation Closes — L'invitation prend fin <b>At /à: 11 AM</b>	Time Zone — Fuseau horaire EST(Eastern Standard Time) / HNE (heure normale de l'Est) EDT(Eastern Daylight Saving Time) / HAE (heure avancée de l'Est)
<b>On / le : 2015-07-20</b>	

F.O.B. — F.A.B.  
**Plant-Usine:**  **Destination:**  **Other — Autre:**

Address Enquiries to — Adresser toutes questions à:  
 Emilie.hamelin-boileau@international.gc.ca

Telephone No. – No de téléphone: 343-203-1303	FAX No. – No de télécopieur : N/A
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Destination - of Goods and or Services:  
 Destination – des biens et ou services :

Foreign Affairs, Trade and Development Canada (DFATD)  
 Affaires étrangères, du Commerce et du Développement Canada (MAECD)

**Instructions:** See Herein — Voir aux présentes

Delivery Required — Livraison exigée See herein — voir aux présentes	Delivery Offered — Livraison proposée
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Vendor/Firm Name and Address — Raison sociale et adresse du fournisseur/de l'entrepreneur:

Telephone No. – No de téléphone:	FAX No. – No de télécopieur :
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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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**BID SOLICITATION  
Connect 2 Canada  
FOR  
GOVERNMENT OF CANADA**

## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

The bid solicitation is divided into seven 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, if applicable, and the basis of selection;
- Part 5 Certification
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders;
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting Contract.

The annexes include the Statement of Work and the following:

- Annex A Statement of Work
- Annex B Pricing Tables
- Annex C Federal Contractors Program for Employment Equity – Certification
- Annex D Evaluation Criteria

### **1.2 Summary**

Canada has a requirement for a service provider who can maintain and enhance the online presence for Connect2Canada and Lien Canada, a virtual grassroots network. This network works in tandem with a database customer relationship management system situated on the Canadian Embassy in the United States, that allows the Canadian Embassy in the U.S and Canadian consulates in the US to easily and effectively recruit new contacts, communicate with members, to measure actions taken by network members (who join the Connect2Canada network), and disseminate information in a targeted and timely manner.

This requirement include 2 parts;

1. The consulting and technical work that will be under task authorization with an firm hourly rate, on ‘,as and when required basis’; for the Contract and the Options period
2. The annual licenses fee with a fixed cost component

### 1.3 Debriefings

After contract award, 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.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

- (a) 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.
- (b) 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.
- (c) The 2003 (2014-09-25) Standard Instructions - Goods or Services - Competitive Requirements are incorporated by reference into and form part of the bid solicitation. If there is a conflict between the provisions of 2003 and this document, this document prevails.
- (d) Subsection 5(4) of 2003, Standard Instructions - Goods or Services - Competitive Requirements is amended as follows:
  - (i) **Delete:** sixty (60) days
  - (ii) **Insert:** one hundred eighty (180) days
- (e) Subsection 1 of 2003, Standard Instructions - Goods or Services - Competitive Requirements is amended as follows:
  - (iii) **Delete** 01 (2014-09-25) Integrity Provisions – Bid paragraph **3 to 8; paragraph 10; paragraph 12 to 14**

### 2.2 Submission of Bids

- a. Bids must be received by the Contract Authority at the location identified by the date, time and place indicated on page 1 of the solicitation.
- b. Bids must be delivered to the following location, by the time and date indicated below:

**At 11:00 AM** On **2015-07-20** Time Zone: EDT (Eastern Daylight Time)  
**Email address for submitting your bid:** [itservices.aaci@international.gc.ca](mailto:itservices.aaci@international.gc.ca)

Bid Receiving Unit Address is Solely for Delivery of Bids: The above address is for the sole purpose of bid submission. No other communications are to be forwarded to this address. Canada will not be responsible for late bids received at destination after the closing date and time, even if it was submitted

before.

### **2.3 Enquiries – Bid Solicitation**

- (a) All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.
- (b) 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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

### **2.4 Applicable Laws**

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

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.

### **2.5 Improvement of Requirement During Solicitation Period**

Subject to Section 2.3 above, if bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled “Enquiries - Bid Solicitation”. Canada will have the right to accept or reject any or all suggestions.

All enquiries must be submitted in writing to the Contracting Authority no later than **10 calendar** days before the bid closing date. Enquiries received after that time may not be answered

## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **3.1 BID PREPARATION INSTRUCTION**

a. **Attached electronic documents of Bid:**

- i. Document I: Technical Bid
- ii. Document II: Financial Bid
- iii. Document III: Certifications not included in the Technical Bid

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

TO: [itservices.aaci@international.gc.ca](mailto:itservices.aaci@international.gc.ca)

**Department of Foreign Affairs, Trade and Development (DFATD)**  
**ATTN: Emilie Hamelin Boileau – AACI**

- b. **Format for Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid :
- iii. use a numbering system that corresponds to the bid solicitation;
  - iv. include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
  - v. Include a table of contents.
- c. **Submission of Only One Bid from a Bidding Group:**
- i. The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will set aside all bids received from members of that bidding group.
  - ii. For the purposes of this article, "**bidding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation if:
    - A. they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
    - B. they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*;
    - C. the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
    - D. the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

**D. Joint venture experience:**

Except where expressly provided otherwise, at least one member of a joint venture Bidder must meet any given mandatory requirement of this bid solicitation. Joint venture members cannot pool their abilities to satisfy any single mandatory requirement of this bid solicitation. Wherever substantiation of a mandatory requirement is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the solicitation period.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance services, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single requirement, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

### **E. Conflict of Interest - Unfair Advantage**

1. In order to protect the integrity of the procurement process, bidders are advised that Canada may reject a bid in the following circumstances:
  - a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
  - b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give or appear to give the Bidder an unfair advantage.
2. The experience acquired by a bidder who is providing or has provided the goods and services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This bidder remains however subject to the criteria established above.
3. Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

### **3.2 Section I: Technical Bid**

- (a) In their technical bid, bidders must demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders must demonstrate their capability in a thorough, concise and clear manner for carrying out the work. The technical bid must address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated.

Bidders must be aware that simply stating "Compliant or Responsive", "Fully Compliant or Fully Responsive" or just repeating the requirement will not necessarily constitute meeting a mandatory or a rated requirement. In its response, the Bidder must demonstrate its understanding of the requirement and must describe how they meets the requirement. Where Canada determines that the substantiation related to a mandatory requirement is not complete, the bid will be considered non-responsive and will be disqualified.

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.
- (b) The substantiation may refer to additional documentation submitted with the bid. Valid forms of technical documentation reference material include, but are not limited to:
  - (i) Screen captures, clearly legible, with text explanations
  - (ii) Technical or end-user documentation. If this documentation is stored within a website, extract the supporting information and insert it within your response or attach the documentation as an annex. Clearly indicate what portions of the text (pages and paragraphs) provide the explanation or demonstration required.

- (iii) Training documentation. Online training content can be extracted or captured as a clearly legible image and inserted into your response.
  - (iv) Other acceptable forms of documentation or demonstration of compliance that can be included within your response and directly referenced.
- (c) For the purposes of substantiation of Technical Compliance, Bidders must be aware that any reference to a URL that requires Canada to download information from an Internet site to validate any of the mandatory requirements will not be accepted and the information will not be considered to determine if the requirement has been met.
- (d) Any bid that contains assumptions or qualifications that implies that the bid is conditional on modification(s) to the requirements of the bid solicitation will be considered non-responsive. Bidders with concerns about the requirements should raise their concerns in accordance with the Enquiries provision of this bid solicitation.
- (e) The technical bid consists of the following:

**(d) Reference Projects**

Where the bid must include a description of reference projects, as per Annex D – Technical Evaluation, section B-Point Rated Technical Criteria:

1. a project must have been completed or commenced by the bid closing date;
2. each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and
3. if more reference projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.

**3.3 Section II: Financial Bid**

- (a) **Pricing:** Bidders must submit their financial bid in accordance with Annex B – Basis of Payment without any conditions, assumptions, or restrictions. Any financial proposal that purports to restrict the way in which Canada acquires goods or services under the resulting Contract, with the exception of those limitations that are expressly set out in this solicitation, will be considered non-responsive. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable. Unless otherwise indicated, bidders must include a single, firm, all-inclusive price quoted in Canadian dollars in each cell requiring an entry in Annex B – Basis Of Payment
- (b) **All Costs to be Included:** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option years.
- (c) **Blank Prices:** Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

**3.4 Section III: Certifications**

Bidders must submit the certifications required under Part 5

**PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

**4.1 Evaluation Procedures**



- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. There are several steps in the evaluation process, which are described below. Even though the evaluation and selection will be conducted in steps, the fact that Canada has proceeded to a later step does not mean that Canada has conclusively determined that the Bidder has successfully passed all the previous steps. Canada may conduct steps of the evaluation in parallel.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids. Canada may hire any independent consultant, or use any Government resources, to evaluate any bid. Not all members of the evaluation team will necessarily participate in all aspects of the evaluation.

#### 4.2 Technical Evaluation

(a) **Mandatory Technical Criteria:**

Each bid will be reviewed for compliance with the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words “must” or “mandatory” is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be declared non-responsive and be disqualified.

(b) **Point-Rated Technical Criteria:**

Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly. The rated requirements are described in ANNEX“(D)” - Bid Evaluation Criteria.

(c) **Customer Reference Checks:**

- (i) For reference checks, Canada will conduct the reference check in writing by e-mail. Canada will send all e-mail reference check requests to contacts supplied by all the Bidders on the same day using the e-mail address provided in the bid. Canada will not award any points unless the response is received within 3 working days of the date that Canada's e-mail was sent.
- (ii) On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by e-mail, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within 5 working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and e-mail address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer. The Bidder will have 24 hours to submit the name of a new contact. That contact will again be given 3 working days to respond once Canada sends its reference check request.
- (iii) Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.

#### 4.3 Financial Evaluation

- (a) The financial evaluation will be conducted by calculating the **Total Bid Price (TBP)** using the Pricing Tables completed by the Bidder. Each bid will be reviewed for compliance with the mandatory financial requirements of the bid solicitation.
- (b) For the purposes of bid evaluation only, the TBP will be the total of the Bidder's proposed prices in each of the following tables:

(i) Annex B - Table A) – The creation/customization of the Connect2Canada.com platform: Firm Price + License Fee for initial Term + Hourly Rate for consulting and technical work (task authorization)

(ii) Annex B - Table B-Option Period 01) –Annual License + Hourly Rate for consulting and technical work (task authorization)

(iii) Annex B - Table C-Option Period 02) –Annual License Fee + Hourly Rate for consulting and technical work (task authorization)

(vi) Annex B - Table D-Option Period 03) –Annual License Fee + Hourly Rate for consulting and technical work (task authorization)

(v) Annex B - Table E-Option Period 04) –Annual License Fee + Hourly Rate for consulting and technical work (task authorization)

To complete this calculation the following formula is used:

Total Bid Price (TBP) = Table A Total + Table B Total + Table C Total + Table D Total + Table E Total

**[Note to Bidders:** Table Totals will be calculated using the formula that follows the corresponding table in Annex B. It is a mandatory requirement of this solicitation that the Total Bid Price quoted by a Bidder be firm and all inclusive, not subject to any conditions

#### 4.4 BASIS OF SELECTION -COST PER POINT

To be considered responsive, a bid must:

- a. meet all the mandatory requirements of this solicitation;
- b. obtain the required minimum of **70 percent overall of the points** that correspond to the rated criteria set out in **Annex D, Section B**

Neither the valid proposal that scores the highest number of rating points, nor the one that contains the lowest cost estimate will necessary be accepted.

The selection of the Contractor will be made on the basis of **the best overall value to the Crown in terms of technical merit and costs**, which will be determined by dividing the proposed total costs calculated in the manner set out in Annex B of this RFP, including the Option periods, by the total technical score, to establish the lowest cost per point.”. The lowest price per rated point will be determined as follows. Price per Rated Point = Total Cost ( Including Option Periods) / Total Points Achieved .For evaluation purposes only, the total price shall be established as specified in Annex B.

#### THE FOLLOWING TABLE IS FOR ILLUSTRATIVE PURPOSES ONLY

Bidder	Quoted Price Excluding Taxes	Total Technical Points	Cost Per Point
Bidder 1	\$75,000.00	78	\$ 961.54 per point
Bidder 2	\$92,000.00	83	\$1,108.44 per point

*Bidder 3	\$81,000.00	88	\$ 920.46 per point
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\*In the above scenario, Bidder #3, would be declared the successful bidder.

## PART 5 – CERTIFICATION

Bidders must provide the required certifications and documentation 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 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 with this request will also render the bid non-responsive or will constitute a default under the Contract.

### 5.1 Certifications Required 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 so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

#### 1. Code of Conduct and Certifications - Related documentation

By submitting a bid, the Bidder certifies that the Bidder and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications - Bid of Standard Instructions 2003. The related documentation therein required will assist Canada in confirming that the certifications are true.

#### 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 ventures, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list ([http://www.labour.gc.ca/eng/standards\\_equality/eq/emp/fcp/list/inelig.shtml](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)) available from [Human Resources and Skills Development Canada \(HRSDC\) - Labour's](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/index.shtml) website. ([http://www.labour.gc.ca/eng/standards\\_equality/eq/emp/fcp/index.shtml](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/index.shtml))

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](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list at the time of Contract award.

The Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), before Contract award. If the Bidder is a joint venture, the Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), for each member of the joint ventures.

## PART 6- SECURITY, FINANCIAL AND OTHER REQUIEREMENTS

## 6.1. Security Requirement

6.1.1 The term "Mission" as found herein means the Canadian Embassy in the United States or any Canadian consulate found in the United States."

6.1.2 As set out in the Statement of Work forming part of this Contract, the Contractor's obligations under this Contract shall include (without limitation) the preparation and updating of Connect2Canada membership distribution lists, and the uploading of Connect2Canada member profiles and updates to the profiles provided by members onto the Connect2Canada system. The Contractor shall host Web pages and databases, which may include such distribution lists and membership profiles, on behalf of the Missions, and may also require access to other data or records owned or controlled by Canada for purposes of this Contract. These databases, data, records, and Web Pages, are and shall be the property of Canada and shall be subject to the control of the Embassy of Canada. The Contractor shall segregate the databases, distribution lists, data and Web pages ("Canada's information") on its servers, and shall not store them together with its other records, data and information. Canada's information shall be used by the Contractor solely for the purposes of this Contract, and shall not be used, in whole or in part, by the Contractor for any other purpose (commercial or otherwise). Upon the expiry or termination of this Contract, the Contractor shall abide by directions and instructions given by the Embassy of Canada as to the disposition and / or destruction of Canada's information. The Contractor shall also abide by all directions and instructions given by the Embassy of Canada with respect to the security, storage, or use of Canada's information.

6.2 The Contractor shall use high level security measures to protect against the loss, misuse, and alteration of information under their control. The Contractor must store information in databases located in secure data centers. Unique names and passwords shall be provided to the Missions. The usernames and passwords shall be required each time an Missions user logs on to the database management system. Canada will own the information collected about their End Users.

6.3 After the contract is awarded and in the event that the Scope of Work is altered to include Contractor access to the Mission and its computer systems and/or SIGNET online accounts, a minimum personnel security screening level of RELIABILITY STATUS will need to be obtained for each of the Contractor's personnel working at the Mission. The Contractor and/or all other personnel involved in work must be properly supervised while on the premises of the Mission. Access to the restricted zones of the Mission may only be granted under the escort and constant supervision of a member of the Canada-based staff (CBS). Failure to obtain the Reliability Status prior to entering the Mission would render the Contract null and void. The minimum security screening level required is granted by the Mission Security Officer or other CBS authorized by the Head of Mission in accordance with the procedures outlined in the Personnel Security Screening Reference Guide for Mission Managers. Missions requesting a security clearance for Contractors to perform work in restricted zones of the Mission or to access classified information/assets must consult with ISR and ISC.

6.4 The Contractor shall be responsible to identify the Security Requirement Section of the Contract and all of its stipulations to their Subcontractors and to ensure that these requirements are complied with by the subcontractor.

6.5 DFATD reserves the right to conduct periodic background checks on personnel employed or subcontracted by the contractor, who have access to personal information or the Mission and/or its computer systems.

6.6. "DFATD reserves the right, in its sole discretion and acting reasonably, to decide that personnel employed or subcontracted by the contractor are unsuitable. In such circumstances, the contractor shall ensure that personnel are removed from Embassy property. DFATD shall be deemed to be exercising its discretion reasonably if it requests the removal of personnel for reasons of security or competence. In such circumstances, the Contractor shall ensure that the personnel are removed from Embassy property and replaced with personnel that DFATD deems suitable."

6.7 The Contractor shall not use the funds paid pursuant to this contract for the purpose of any payment to persons or entities, or for the supply of goods or services, if such payment or supply to the Contractor's knowledge or belief, is prohibited by a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations or is made, directly or indirectly, to finance, support, facilitate or benefit a terrorist or a terrorist group listed under the Canadian Criminal Code, the United Nations Al-Qaida and Taliban Regulations or the Regulations Implementing the United Nations Resolutions on the Suppression of Terrorism.

## PART 7 - RESULTING CONTRACT CLAUSES

The following clauses apply to and form part of any Contract resulting from the bid solicitation. Except where specifically set out in the bid solicitation, acceptance by the Bidder of all the clauses is a mandatory requirement of the bid solicitation. No modification or other terms and conditions included in a bid will apply to any resulting Contract even if the bid is incorporated into that Contract. Any bid that contains statements implying that the bid is conditional on modification of these clauses, or containing terms and conditions that purport to supersede these clauses, will be considered non-responsive. Bidders with concerns about these clauses should raise their concerns in accordance with the Enquiries provision of this bid solicitation.

### 7.1 Requirement

- (a) \_\_\_\_\_ (the Contractor) agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with and at the prices set out in the Contract. This includes providing professional services, as and when requested by Canada, to one or more locations to be designated by Canada, excluding any locations in areas subject to any of the Comprehensive Land Claims Agreements.
- (b) **Client:** Any reference to "Client" or "Clients" includes any Canadian government department, Crown corporation or agency as described in the *Financial Administration Act*
- (c) **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Project Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- (d) **Defined Terms:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions.
- (e) The Contractor agrees it shall hold no license or permission to use the data or information collected under the terms of this Agreement, that the data or information may be used by the Contractor solely for purposes of this Agreement, and that the Contractor shall not otherwise deal, trade or exploit the said data or information

### 7.2 TASK AUTHORIZATION

**Purpose of TA:** Services to be provided under the Contract on an as-and-when-requested basis will be ordered by Canada using a Task Authorization ("TA").

- a. **Purpose of TA:** Services to be provided under the Contract on an as-and-when-requested basis will be ordered by Canada using a Task Authorization ("TA").
- b. **Process of Issuing a TA:** If a requirement for a specific task is identified, a draft "statement of task" will be prepared by the Technical Authority and sent to the Contractor. Once it receives the statement of task, the Contractor must submit a quotation to the authority identified in the TA detailing the cost and time to complete the task. The Contractor's quotation must be based on the rates set out in the Contract. The Contractor will not be paid for providing the quotation or for providing other information required to prepare and issue the TA. The Contractor must provide any information requested by Canada in relation to the preparation of a TA within three working days of the request, unless otherwise specified.
- c. **Approval Process:** If Canada approves the Contractor's task quotation, Canada (by its authorized representative, as described in this contract) will issue the TA by forwarding a signed copy of the final TA form to the Contractor. Whether or not to approve or issue a TA is entirely within Canada's discretion.
- d. **Contents of a TA:** A Task Authorization must contain the following information, if applicable:
  - i. a task number;
  - ii. the details of any financial coding to be used;
  - iii. the number of resources required;
  - iv. a brief statement of work for the task outlining the activities to be performed and identifying any deliverables;
  - v. the interval during which the task is to be carried out (beginning and end dates);
  - vi. milestone dates for deliverables and payments (if applicable);
  - vii. the number of person-days of effort required;
  - viii. the specific work location;
  - ix. the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
  - x. any other constraints that might affect the completion of the task.
- e. **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the Task Authorization unless Canada has issued a TA amendment authorizing the increased expenditure. 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 being incorporated into the Work.
- f. **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all Task Authorizations issued and approved by the Contracting Authority to date, to document the Work performed under those TAs for administrative purposes.
- g. **Refusal of Task Authorizations:** Unless specified otherwise in the RFP, the Contractor is required to submit a quotation in response to every draft statement of task issued by Canada. Canada may immediately, and without further notice, terminate the Contract for default if the Contractor does not submit a quotation in response to a draft statement of task issued during the Contract Period.

### 7.3 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](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) Manual issued by Public Works and Government Services Canada.

### 7.4 Supplemental Condition

7.4.1 PWGSC 4008 (2008-12-12) and PWGSC 4006 (2010-08-16), shall form part of this solicitation document and any resulting Contract.

It can be viewed at the following website address:

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4008/2>

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4006/3>

7.4.2 PWGSC A0072C (2008-12-12 Termination on Thirty Days' Notice) shall form part of this solicitation document and any resulting Contract. It can be viewed at the following website address:

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/5/A/A0072C/2> .

## 7.5 General Conditions

7.5.1 PWGSC 2035 (2014-09-25), as modified herein, shall form part of this solicitation document and any resulting Contract.

They can be viewed at the following website address:

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/all>

Subsection 1 of 2035, General Conditions - Higher Complexity – Services is amended as follows:

(iv) **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

(v) **Insert:** Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Minister of **Foreign Affairs, Trade and Development Canada (DFATD)** and any other person duly authorized to act on behalf of that minister or, if applicable, an appropriate minister to whom the Minister of **Foreign Affairs, Trade and Development Canada (DFATD)** has delegated his or her powers, duties or functions and any other person duly authorized to act on behalf of that minister

### 7.5.2 2035 29 (2014-09-25) Default by the Contractor

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a joint venture, appears on the "FCP Limited Eligibility to Bid" list during the period of the Contract

## 7.6 Term of Contract

### 7.6.1 Period of the Contract

The initial period of the Contract is from September 1<sup>st</sup>,2015 to August 31<sup>st</sup>,2016

## 7.7 Authorities

### 7.7.1 Contracting Authority

The Contracting Authority for the Contract is:

**Name:** Emilie Hamelin Boileau

**Title:** Procurement Officer

**Telephone:** (343) 203-1303

**E-mail:** [emilie.hamelin-boileau@international.gc.ca](mailto:emilie.hamelin-boileau@international.gc.ca)

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. 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.

### 7.7.2 Project Authority

The Project Authority for the Contract is: *To be entered at contract award*

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the 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.

### 7.7.3 Contractor's Representative

The Contractor's Representative for the Contract is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone : \_\_\_\_ \_

Facsimile: \_\_\_\_ \_

E-mail address: \_\_\_\_\_

## 7.8 Payment

### (A) Basis of Payment:

2. The annual licenses fee with a fixed cost component

#### (i) Basis of Payment - Firm Hourly Rates

1. **For the consulting and technical work that will be under task authorization**, Contractor will be paid with an firm hourly rate, on ``as and when required basis"; for the Contract period and the Options period. Customs duties are "excluded"

#### (ii) Basis of Payment - Firm Price – Services



**1. For the annual licenses fee**, in consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \$ \_\_\_\_\_ for the contract period and the Options period.

(iii) **Pre-authorized Travel and Living Expenses** apply to this requirement: Yes  No

**B. Limitation of Expenditure –Task Authorizations For Professional Services part of the contract**

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment in Annex B to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are "*excluded*" and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA 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 authorized, in writing, by the Contracting Authority before their incorporation into the Work.

For **Services part of the contract** (Annual License Fee )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.

**C. Monthly Payment** 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 :

- i. 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;
- ii. all such documents have been verified by Canada;
- iii. the Work performed has been accepted by Canada.

**D. Time Verification**

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada's request.

**7.9 INVOICING INSTRUCTIONS**

- (a) Canada will only be required to make payment following receipt of an invoice that satisfies the requirements of this Article.
- (b) The Contractor will submit invoices on its own form, which will include:
  - (i) the date;
  - (ii) the Contractor name and address;
  - (iii) the Destination (name and address of the client department);
  - (v) Contract purchase order (PO) number;
  - (vi) Financial codes, including GST or HST (as applicable) registration number;
  - (vii) Portion of the work for task authorization
- (c) Invoices shall be sent to the **Project Authority** and one (1) copy of the original invoice to:  
Embassy of Canada

501 Pennsylvania Avenue NW  
Washington, DC 20001

### 7.9.1 Time Verification

Time charged and the accuracy of the Supplier's time recording system may be verified by Canada's representative before or after payment is made to the Supplier under the terms and conditions of the Contract. If verification is done after payment, the Supplier agrees to repay any overpayment immediately upon demand by Canada.

### 7.9.2 Interest on Overdue Accounts

For the purposes of this section:

- (a) **"Average Rate"** means the simple arithmetic mean of the Bank Rates in effect at 4:00 p.m. Eastern Standard Time each day during the calendar month which immediately precedes the calendar month in which payment is made, where the "Bank Rate" means the rate of interest established from time to time by the Bank of Canada as the minimum rate at which the Bank of Canada makes short term advances to members of the Canadian Payments Association.
- (b) **"date of payment"** means the date of the negotiable instrument drawn by the Receiver General for Canada and given for payment of an amount due and payable;
- (c) an amount is **"due and payable"** when it is due and payable by Canada to the Contractor in accordance with the terms of the Contract; and
- (d) an amount becomes **"overdue"** when it is unpaid on the first day following the day upon which it is due and payable.
- (e) Canada shall be liable to pay to the Contractor simple interest at the Average Rate plus 3 percent per annum on any amount that is overdue, from the date such amount becomes overdue until the day prior to the date of payment, inclusive. No interest will be payable or paid in respect of payment unless the Contractor so requests after payment has become due.
- (f) Canada shall not be liable to pay interest in accordance with this clause if Canada is not responsible for the delay in paying the Contractor.
- (g) Canada shall not be liable to pay interest on overdue advance payments.

### 7.10 Applicable Laws

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

### 7.11 Plug-in Software

Any plug-in/software to be installed onto DFATD system computers must be checked and cleared by DFATD IT security prior to installation. Any plug-in/software which fails our security check must be revised to meet security requirements. In addition, any plug-in/software should be developed using reliable tools and techniques to prevent access to users' local or network drives. The developer of the plug-ins/software must state that the code (software or plug-in) is free from viruses and malicious components. Any plug-in will

have to be digitally signed for identification purposes.

## **7.12 Priority of Documents**

In interpreting this solicitation document and any resulting Contract, 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) these Articles of Agreement
- (b) Supplemental General Conditions, in the following order:
  - (i) PWGSC 4008 (2008-12-12)
  - (ii) PWGSC 4006 (2010-08-16)
- (c) General Conditions 2035 (2014-09-25);
- (d) Annex A Statement of Work;
- (e) Annex B Basis of Payment;
- (f) Annex D, Federal Contractors Program for Employment Equity - Certification;
- (g) Annex C ,Security Requirements Check List
- (h) the Contractor's bid dated :

## **ANNEX A - STATEMENT OF WORK**

### **A. BACKGROUND**

Connect2Canada.com, a virtual network for Canadians and friends of Canada in the United States, was launched on July 1, 2005. Since that announcement, over 56,000 people have joined "Canada's network in the United States" to receive updates on subjects as diverse as our energy relationship, trade figures, the Canada-US border issues and Canadian cultural events in the United States. The initiative serves to promote Canadian Government interests in the U.S. and further our advocacy, trade and consular goals. The bilingual tool reaches people who have a connection with Canada, such as Americans doing business with Canada and the Canadian expatriate community in the US.

Connect2Canada is a way to exchange news and ideas, and find out what is happening in the U.S. with respect to Canada-related issues. Members of the network can receive email notices on a range of topics and can share their stories with others. As the network continues to grow, it will serve as a knowledge base and a ready resource for facts on the major issues in the United States and Canada.

### **B. OBJECTIVE**

To maintain and enhance the online presence for Connect2Canada and Lien Canada, a virtual grassroots network that works in tandem with a database customer relationship management system that allows the Canadian Embassy in Washington, DC and Canadian consulates in the US to easily and effectively recruit new contacts, communicate with members, measure actions taken by network members, and disseminate information in a targeted and timely manner.

### **C. SCOPE OF WORK**

#### **TASKS**

The Canadian Embassy requires professional services to provide advice and assist the Connect2Canada team on an as-needed basis to maintain and develop the Connect2Canada website and message delivery system. The duties to be performed include the following:

#### **Services:**

- (1) Provide a system capable of managing a database of more than 200,000 individuals, and multiple distribution lists (this will be part of the fix requirement and not the task authorization part of the contract ) .
- (2) Maintain (this will be part of the fix requirement and not the task authorization part of the contract ) and expand (as determined as determined by the Project Authority) seamlessly the existing web and email marketing management platform that recruit members to the Connect2Canada network, provide a vehicle to send information to members, allow members to input information in feedback forms, facilitate information exchange among members, and allow the Canadian Embassy in the US, to track the level of participation of network members lists .
- (3) Maintain (this will be part of the fix requirement and not the task authorization part of the contract ) and provide upgrades as determined to an intuitive design interface that allows non-technical staff to easily manage data, send messages to members, generate distribution lists and extract member information and statistics.
- (4) Expand and support (this will be part of the fix requirement and not the task authorization part of the contract )

(as determined) Connect2Canada's social media outreach tools and corresponding outreach strategies including increasing Connect2Canada membership. This includes (but is not limited to) Facebook, Twitter, Flickr, YouTube, LinkedIn and any other social media and/or networking tools of potential use.

- (5) Provide advice (as determined) on comprehensive reporting and analysis of campaign success through aggregating membership and campaign data and allowing for exporting of data to other programs such as Excel, Access, and/or Filemaker Pro.
- (6) Provide advice and technical support (as determined) including after hours support, in the development and implementation stages of secondary outreach campaigns such as microsites or distribution of communication products while maintaining main web and email marketing campaign.
- (7) Maintain, support (this will be part of the fix requirement and not the task authorization part of the contract ) and update the website known as: [www.connect2canada.com/innovationscan](http://www.connect2canada.com/innovationscan) as the ultimate webmaster. Note that the site has a full French & English version. More specifically, InnovationScan support includes:
  - a. Configure and upload new company profiles to the website on an as needed basis. Estimate of four new companies per quarter;
  - b. Utilize existing Dropbox structure for receiving files and for facilitating new presentation uploads;
  - c. Apply security patches and software updates as needed;
  - d. Ensure best practices are utilized to protect/defend the site from hackers, malware, viruses, DOS attacks and other threats;
  - e. Maintain ongoing and current compliance with GoC CLF, Accessibility, Usability and mandated requirements;
  - f. Provide technical support for user issues
  - g. Provide incremental improvements and refinements to user process
  - h. Provide monthly usage, data and analytics report
  - i. Ad hoc requests from PM as necessary(a too i , will be part of the fix requirement and not the task authorization part of the contract )
- (8) Support maximum of five Embassy administrative users, so that if changes or additions need to be made to the website or if email messages need to be sent to all or some of the members, it can easily be done by Canadian Embassy staff (this will be part of the fix requirement and not the task authorization part of the contract ).
- (9) Design and execute the project in such a way that its scope and functionality could be easily expanded in the future without a complete re-build. Any changes to the design of the site and/or messaging must be consistent with the Government of Canada's (to be provided by the Embassy of Canada; this will be part of the fix requirement and not the task authorization part of the contract )
- (10) Provide training to five users and such training shall include initial on-site training and ongoing training (on-site or virtual as determined by the Embassy) throughout the contract period. The ongoing training and/or briefing would only be required if there are modifications to the platform and/or modifications to the technology relevant to our outreach strategy (this will be part of the fix requirement and not the task authorization part of the contract ).

- (11) Provide training sessions as determined to users at the Embassy and/or Consulates General each year via screenshare/conference call (topics may include, but are not limited to email creation and content posting to calendar; (this will be part of the fix requirement and not the task authorization part of the contract )
- (12) Support the existing capability and functionality to (this will be part of the fix requirement and not the task authorization part of the contract )
- (a) Automatically track and archive email use such as open rates, forwarding to others, opening of URL links, or requests to unsubscribe;
  - (b) Enable the development of evergreen customized distribution lists organized by zip code, state, congressional district, state level district, member interests, or previous measured actions, including whether a message was opened or a link was clicked upon;
  - (c) Allow Embassy to customize messages based on network member location, topic interests, past actions, and language preference;
  - (d) Provide a corresponding website in French language that mirrors the Connect2Canada site as well as the capabilities to send messages in French.
  - (e) Incorporate and/or distribute additional social media tools, graphics, sound, video and flash files, podcasts, and other related media transmission into the current site;
  - (f) Allow network members to create profiles and manage their own contact information and electronic subscription preferences;
  - (g) Allow members and/or the public to contribute user generated content to be moderated and approved by the Embassy;
  - (h) Allow primary email products coming from the Embassy of Canada to be tailored with localized content from the Canadian Consulates to audiences in their territories while control permissions for Consulates are centrally managed by the Embassy;
  - (i) Ensure the database of member information is accessible to users in various Consulates and Consulates General, so they can add members or update data for contacts in their region;
  - (j) Develop the platform that will enable Embassy to create and distribute HTML based e-newsletters on various topics of interest, such as summaries of Canadian news, government announcements, recent speeches, and developments on Canada-U.S. files. (The Embassy would be responsible for the content of the newsletters)
  - (k) Expand event management, to permit staff to create, track, and manage invitations and corresponding RSVP functionality for Embassy and Consulate events;
  - (l) Upload member data into the system via Excel;
  - (m) Automatically track membership increases and decreases on a daily basis.

#### **D. CONTRACT TIMELINE**

The work is to commence on July 1, 2015 with a non-negotiable go-live date of September 1, 2015. The sites (Connect2Canada and Lien Canada) must be fully functional and pre-tested prior to September 1, 2015.

#### **E. PAYMENT SCHEDULE**

Contractor will submit invoices on a monthly basis, unless otherwise agreed between the parties, and such invoices will be paid within 30 calendar days of receipt of invoice.

#### **F. Constraints**

- System maintenance resulting in interruption of service should only be performed on Saturday-Sunday; contractor will provide 24hr notice of any interruption of service.

#### **G. Knowledge and Data Transfer**

Upon formal notice of contract termination, the vendor (within 30 days) will provide a detailed agenda and timeline for the transfer of knowledge to the contract holder or designate. (i.e. new vendor) This will include but not be limited to the following:

- a. Website construction, versioning, all linkages, mandated and initiated standards used, database construction, tools used, and configuration(s).

The vendor will also provide a timeline and methodology for transfer of all 'data' to the contract holder or designate. In addition, the vendor, upon completion of the data transfer, will certify that all the data has been transferred and that there are no copies (or backup versions) or data fragments that exist within the vendors IT infrastructure or sub-contracted IT infrastructure(s) that may have been used to store , maintain or back-up said data.

#### **H. Data property**

Usage of the data is prohibited unless there is permission from the Government of Canada.

**ANNEX "B"**  
**Proposed Basis of Payment**

**BIDDERS MUST SUBMIT FINANCIAL INFORMATION FOR ALL OF THE FOLLOWING:**

**(A) For the period from date of September 1, 2015 to August 31<sup>st</sup>, 2016**

All inclusive firm price and hourly rate for Task authorization, in US dollars for the following:

	<b>Estimated Hours of Work for Initial Term</b>	<b>Contract Term Price</b>
(1) The creation/customization of the Connect2Canada.com platform including, but not limited to, the conversion of all existing site content to the new platform (with existing HTML coding provided), movement of all member data (including audiences and actions history) to new database, development of e-newsletter templates, and all necessary troubleshooting and testing to ensure that both the English and French sites are capable of going live on or before <b>September 1, 2015</b> in accordance with Annex "A" - Statement of Work.	N/A	\$_____
(2) License Fee for Initial Term  BIDDERS MUST STATE THE PAYMENT SCHEDULE FOR THE LICENSE FEE I.E. MONTHLY/QUARTERLY/ANNUAL (IN ADVANCE/ARREARS): _____	N/A	\$_____
(3) Hourly Rate for consulting and technical work to be provided on an as-needed basis pursuant to the issuance of (a) Task Authorization(s), as described in Annex "A" – Statement of Work "	Up to a maximum of 600 hours	\$_____
<b>TOTAL CONTRACT COST</b>		<b>\$_____</b> <b>(A)</b>

**(B) Option Year #1 . For the period from the date of September 1, 2016 to August 31 ,2017**

All inclusive firm price and hourly rate for Task authorization,, in US dollars for the following:

<b>Description</b>	<b>Estimated Hours of Work per year</b>	<b>Contract Term Price</b>



(1) Annual License Fee	N/A	\$ _____
(2) Hourly Rate for consulting and technical work to be provided on an as-needed basis pursuant to the issuance of (a) Task Authorization(s), as described in Annex“A” – Statement of Work	Up to a maximum of 300 hours*	\$ _____
<b>TOTAL CONTRACT COST for Option Period 1</b>		<b>\$ _____ (B)</b>

**(C) Option Year #2 . For the period from the date of September 1, 2017 to August 31, 2018**

Description	Estimated Hours of Work per year	Contract Term Price
(1) Annual License Fee	N/A	\$ _____
(2) Hourly Rate for consulting and technical work to be provided on an as-needed basis pursuant to the issuance of (a) Task Authorization(s), as described in Annex“A” – Statement of Work	Up to a maximum of 300 hours*	\$ _____
<b>TOTAL CONTRACT COST for Option Period 2</b>		<b>\$ _____ (C)</b>

**(D) Option Year #3 . For the period from the date of September 1, 2018 to August 31, 2019**

Description	Estimated Hours of Work per year	Contract Term Price
(1) Annual License Fee	N/A	\$ _____
(2) Hourly Rate for consulting and technical work to be provided on an as-needed basis pursuant to the issuance of (a) Task Authorization(s), as described in Annex“A” – Statement of Work	Up to a maximum of 300 hours*	\$ _____
<b>TOTAL CONTRACT COST for Option Period 3</b>		<b>\$ _____ (D)</b>

**(E) Option Year #4 . For the period from the date of September 1, 2019 to August 31, 2020**

Description	Estimated Hours of Work per year	Contract Term Price
(1) Annual License Fee	N/A	\$ _____
(2) Hourly Rate for consulting and technical work to be provided on an as-needed basis pursuant to the issuance of (a) Task Authorization(s), as described in Annex“A” – Statement of Work	Up to a maximum of 300 hours*	\$ _____

<b>TOTAL CONTRACT COST for Option Period 4</b>		<b>\$_____ (E)</b>

\*"Please note that the estimated number of hours for Task Authorizations is an estimate only and represents the maximum time that Canada has determined, on the basis of historical usage figures, will be required for the work in question. It is therefore not a guarantee that this amount of work will actually be required."

**TOTAL PRICE PROPOSAL = (A+B+C+D+E) = US\$ \_\_\_\_\_**

**ANNEX C**

**CERTIFICATIONS**

**The following certification requirements apply to this Request for Proposal (RFP) document. Bidders are to complete, sign and include each certification below in their proposal (bid). A contract will not be awarded until all certifications have been signed by the Bidder and received by the Crown.**

**1. Certification of Understanding**

The Bidder certifies that all parts of this RFP have been reviewed in detail and are completely understood in order to make its proposal. Under no circumstances will the Statement of Work, specifications, or task description be subject to revised interpretation or amended following contract award except where the Contracting Authority so authorizes in writing.

\_\_\_\_\_  
Signature Bidder/Contractor

\_\_\_\_\_  
Date

**2. Certification of Education/Experience**

We certify that all statements made with regard to the education and the experience of individuals proposed for completing the subject Work are accurate and factual, and we are aware that the Minister reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-responsive. Should a verification by the Minister disclose untrue statements, the Minister shall have the right to treat any contract resulting from this Bid as being in default and to terminate it accordingly.

\_\_\_\_\_  
Signature Bidder/Contractor

\_\_\_\_\_  
Date

**3. Certification of Availability and Status of Personnel**

Certification from the Bidder that all personnel proposed in their submission will be available to commence the work at the period specified herein, and will remain available to perform the work in relation to the fulfilment of this requirement.

If the Bidder/Contractor has proposed any person in fulfilment of this requirement who is not an employee of the Bidder/Contractor, the Bidder/Contractor hereby certifies that it has written permission from such person (or the employer of such person) to propose the services of such person in relation to the work to be performed in fulfilment of this requirement and to submit such person's résumé to the Contracting Authority. If the Bidder/Contractor has proposed any person in fulfilment of this requirement who is or who is not an employee of the Bidder/ Contractor, the Bidder/Contractor hereby certifies that such a person is under no restrictive covenant in relation to a constraint of trade that would prevent the person from fulfilling his or her services in relation to the work. During the bid evaluation, the Bidder/Contractor **MUST** upon the request of the Contracting Authority provide a copy of such written permission, in relation to any or all non-employees proposed. The Bidder/Contractor agrees that failure to comply with such a request may lead to disqualification of the Bidder's/Contractor's proposal from further consideration.

\_\_\_\_\_  
Signature Bidder/Contractor

\_\_\_\_\_  
Date

## Annex D- Evaluation Criteria

### Reference Projects

Where the bid must include a description of reference projects, as per Annex D – Technical Evaluation, section B-Point Rated Technical Criteria:

4. a project must have been completed or commenced by the bid closing date;
5. each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and
6. if more reference projects are provided than requested, Canada will decide in its discretion which projects will be evaluated.

### SECTION A: MANDATORY REQUIREMENTS

Mandatory Requirements	Pass/Fail	Page/Section in Bidder's Proposal that demonstrates the requirement
<p>M1. The Bidder must demonstrate, using project descriptions, that they have successfully completed at least two (2) major projects (or can be currently in progress), based on the following capabilities:</p> <ol style="list-style-type: none"> <li>1. Able to execute web and email marketing management platform that can proactively engage, at minimum, 50,000 individual users; and</li> <li>2. Platform must include multiple social media applications including but not limited to Facebook, Twitter, Flickr, YouTube, and LinkedIn</li> </ol> <p>Bidder must have developed, designed and implemented the above projects.</p> <p><i>For each project provide: project name, client name, project start and end date, project dollar value, and a description of the project including how each of the above requirements were met.</i></p>		
<p>M2 The Bidder must demonstrate, using project descriptions, that the proposed solution is capable of performing <u>each</u> of the following:</p> <ol style="list-style-type: none"> <li>(a) The proposed solution has the ability to be scalable in order to accommodate an ever-expanding network of membership and related data;</li> <li>(b) The proposed solution can adapt to new and dynamic on-line environment. Provide examples of providing and implementing cutting-edge solutions to clients when technology has become newly available or existing technology has become redundant or outdated;</li> <li>(c) The proposed solution must allow for the customization of the clients requirements as scope and additional functionality are required. Provide examples such as Dashboard, web interfaces, languages, etc. Also, describe how the proposed technology allows for 'open architecture' to allow customization;</li> <li>(d) The solution must provide the ability to develop electronic newsletters and/or other communication products and provide a tailored delivery</li> </ol>		

<p>system;</p> <p>(e) The solution must provide the functionality to customize e-mail messages to individual profiles for the provision of relationship tracking;</p> <p>(f) The solution must allow for local customization of messages through local affiliate groups; and</p> <p>(g) The solution must allow network members to create and manage individual profiles in a database.</p>		
<p>M3. Bidder must demonstrate that the proposed solution allows the client to post content on the websites in English or French. The interface should allow for all French characters to be published on the site. The client should be able to readily generate, populate and update both English and French webpages via the same sections of the interface/platform. The interface should support websites with toggle/page to page EN to FR and FR to EN functionality. (Each web page in English must have a corresponding French page, and vice versa.)</p>		
<p>M4. The bidder must propose a team consisting of:</p> <p>(a) one (1) Project Manager with at least four (4) years directly relevant experience to the proposed scope of work; and</p> <p>(b) at least one (1) additional relevant resource Team Member with at least two (2) years of experience directly relevant to the scope of work.</p> <p><i>Bidder must submit a c.v. for each proposed individual demonstrating such experience.</i></p>		
<p>M5. The bidder must provide a detailed schedule which includes clear and measurable benchmarks, deliverables, dates, and methodology for accomplishing each task.</p> <p>Bidder's schedule must include, at minimum, the following milestones:</p> <ul style="list-style-type: none"> <li>• Creation/customization of platform</li> <li>• Development of e-newsletter template</li> <li>• Conversion of all existing content/data to new database</li> <li>• Go-live date for websites (French and English websites must be available simultaneously)</li> </ul>		
<p>M.6 For the projects listed in response to R1, Bidder must provide client references for three of the projects. The contact name, address, title, phone number and email address must be included. To pass this criteria, positive feedback must be received for the two following questions:</p> <p><b>1. Did the Vendor's performance meet the agreed upon objectives of the project/work for which they were retained?</b></p> <p><b>2. Would you hire the Vendor again for a similar project/work? If not, why not?</b></p> <p><i>Only the references from the two most relevant projects will be contacted for evaluation purposes. If a reference cannot be reached the third reference will be contacted.</i></p>		

<p><b>Section B -POINT RATED REQUIREMENTS</b> It is requested that for each of the criteria, bidder statements in this section make direct reference, project identifier, page number, to the supporting section(s) in the proposed resource's resume.</p>		
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Point Rated Requirements	Point Rating	Pts received	Page/Section in Bidder's Proposal that demonstrates the requirement
<b>COMPANY EXPERIENCE</b>			
<p><b>R1.</b>The Bidder should demonstrate using project descriptions that it has obtained experience in the field of grassroots online advocacy by submitting case studies on relevant past projects of similar size and scope For each project provide the following: <b>(1 point for each item):</b> (a) project name; (b) client name; (c) status of project (completed or in progress); (d) start and end date; (e) a description of the scope of work; (f) type of client (government, academic institution, etc.); (g) project dollar value (h) summary of results achieved including, but not limited to, estimated number of users, meeting initial objectives, expansion (if any) of original scope of work)</p>	<p><b>NUMBER OF PAST RELEVANT PROJECTS:</b></p> <ul style="list-style-type: none"> <li>• 5 PROJECTS = UP TO 40 POINTS</li> <li>• 4 PROJECTS = UP TO 32 POINTS</li> <li>• 3 PROJECTS = UP TO 24 POINTS</li> <li>• 2 PROJECTS = UP TO 16 POINTS</li> <li>• 1 PROJECT = UP TO 8 POINTS.</li> </ul> <p><b>(Maximum =40 points)</b></p>		
<b>PRODUCT CAPABILITIES</b>			
<p>R2. The bidder should demonstrate that the proposed methodology to accomplish the work describe in Section C (Items 1-11) of the Statement of Work. will be met.</p> <p><i>Section C (Sow) Services:</i></p> <p>(1) Provide a system capable of managing a database of more than 200,000 individuals, and multiple distribution lists.</p> <p>(2) Maintain and expand (as determined as determined by the Project Authority) seamlessly the existing web and email marketing management platform that recruit</p>	<p>Quality of Methodology:</p> <p><b>Up to 3 points for each item based on the criteria below:</b></p> <ul style="list-style-type: none"> <li>a. 3 points-clear, concise, and fully explained</li> <li>b. 2 points-clear but lacking some detail</li> <li>c. 1 point-not fully defined-many questions</li> <li>d. 0 points-not clearly define</li> </ul>		

<p>members to the Connect2Canada network, provide a vehicle to send information to members, allow members to input information in feedback forms, facilitate information exchange among members, and allow the Embassy to track the level of participation of network members.</p> <p>(3) Maintain and provide upgrades as determined to an intuitive design interface that allows non-technical staff to easily manage data, send messages to members, generate distribution lists and extract member information and statistics.</p> <p>(4) Expand and support (as determined) Connect2Canada's social media outreach tools and corresponding outreach strategies including increasing Connect2Canada membership. This includes (but is not limited to) Facebook, Twitter, Flickr, YouTube, LinkedIn and any other social media and/or networking tools of potential use.</p> <p>(5) Provide advice (as determined) on comprehensive reporting and analysis of campaign success through aggregating membership and campaign data and allowing for exporting of data to other programs such as Excel, Access, and/or Filemaker Pro.</p> <p>(6) Provide advice and technical support (as determined) including after hours support, in the development and implementation stages of secondary outreach campaigns such as <i>microsites or distribution of communication products while maintaining main web and email marketing campaign.</i></p> <p><i>(7) Maintain, update and support the website known as: www.connect2canada.com/innovationscan as the ultimate webmaster. Note that the site has a full French &amp; English version. More specifically, InnovationScan support includes:</i></p> <p><i>a. Configure and upload new company profiles to the website on an as needed basis. Estimate of four new companies per quarter;</i></p> <p><i>b. Utilize existing Dropbox structure for</i></p>	<p><b>(Maximum 33 points)</b></p>		
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<p>receiving files and for facilitating new presentation uploads;</p> <p>c. Apply security patches and software updates as needed;</p> <p>d. Ensure best practices are utilized to protect/defend the site from hackers, malware, viruses, DOS attacks and other threats;</p> <p>e. Maintain ongoing and current compliance with GoC CLF, Accessibility, Usability and mandated requirements;</p> <p>f. Provide technical support for user issues</p> <p>g. Provide incremental improvements and refinements to user process</p> <p>h. Provide monthly usage, data and analytics report</p> <p>i. Ad hoc requests from PM as necessary</p> <p>(8) Support maximum of five Embassy administrative users, so that if changes or additions need to be made to the website or if email messages need to be sent to all or some of the members, it can easily be done by Canadian Embassy staff.</p> <p>(9) Design and execute the project in such a way that its scope and functionality could be easily expanded in the future without a complete re-build. Any changes to the design of the site and/or messaging must be consistent with the Government of Canada's Common Look and Feel Guidelines (to be provided by the Embassy of Canada).</p> <p>(10) Provide training to five users and such training shall include initial on-site training and ongoing training (on-site or virtual as determined by the Embassy) throughout the contract period. The ongoing training and/or briefing would only be required if there are modifications to the platform and/or modifications to the technology relevant to our outreach strategy.</p> <p>(11) Provide training sessions as determined to users at the Consulates General each year via screenshare/conference call (topics may include, but are not limited to email creation and content posting to calendar).</p>			
<p><b>R3.</b> Bidder should describe how the proposed solution will be able to meet each</p>	<p><b>Points:</b></p>		



of the requirements listed in Section C (Items 12 (a-m)) of the Statement of Work. See below. Provide a methodology describing in detail how each of the above items listed in Section C will be met.

*Points will be awarded based on the clarity, comprehensiveness, and feasibility of the proposed methodology.*

12) Support the existing capability and functionality to:

- (a) Automatically track and archive email use such as open rates, forwarding to others, opening of URL links, or requests to unsubscribe;
- (b) Enable the development of evergreen customized distribution lists organized by zip code, state, congressional district, state level district, member interests, or previous measured actions, including whether a message was opened or a link was clicked upon;
- (c) Allow Embassy to customize messages based on network member location, topic interests, past actions, and language preference;
- (d) Provide a corresponding website in French language that mirrors the Connect2Canada site as well as the capabilities to send messages in French.
- (e) Incorporate additional social media tools, graphics, sound, video and flash files, podcasts, and other related media transmission into the current site;
- (f) Allow network members to create profiles and manage their own contact information and electronic subscription preferences;
- (g) Allow members and/or the public to contribute user generated content to be moderated and approved by the Embassy;
- (h) Allow primary email products coming from the Embassy of Canada to be tailored with localized content from the Canadian Consulates to audiences in their

- a. **3 points-clear/concise and fully explained**
- b. **2 points-clear but lacking details**
- c. **1 point-not fully defined-many questions**
- d. **0 points-not clearly defined**

**Maximum 36 points**

<p>territories while control permissions for Consulates are centrally managed by the Embassy;</p> <p>(i) Ensure the database of member information is accessible to users in various Consulates and Consulates General, so they can add members or update data for contacts in their region;</p> <p>(j) Develop the platform that will enable Embassy to create and distribute HTML based e-newsletters on various topics of interest, such as summaries of Canadian news, government announcements, recent speeches, and developments on Canada-U.S. files. (The Embassy would be responsible for the content of the newsletters)</p> <p>(k) Expand event management, to permit staff to create, track, and manage invitations and corresponding RSVP functionality for Embassy and Consulate events;</p> <p>(l) Upload member data into the system via Excel;</p> <p>(m) Automatically track membership increases and decreases on a daily basis.</p>			
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**TEAM QUALIFICATIONS**

<p><b>R4.</b> Bidder should describe the following:</p> <p><b>(A)</b> The number of years of relevant project management experience held by the proposed Project Manager. Provide a copy of the Project Manager’s CV as support.</p> <p>(b) A minimum of three (3) outreach or advocacy grassroots campaigns that the proposed Project Manager has worked on. Outreach or advocacy campaigns can include projects focused on communicating a specific message to a targeted audience in order to mobilize or garner support for a specific issue/cause/position/outcome.</p> <p><i>In your response to (b), provide the client name, the individual’s title and responsibilities, project start and end date, project dollar value, project description, and the relevance of the project to the current Statement of Work.</i></p>	<p><b>(A)</b> Number of years of relevant project management experience:</p> <ul style="list-style-type: none"> <li>• 10+ years = Up to 5 points</li> <li>• 5--9 years= 3 points</li> <li>• &lt;5 years = Up to 2 points</li> </ul> <p><b>(B)</b> Number of relevant campaigns:</p> <ul style="list-style-type: none"> <li>• 9+ = Up to 25 points</li> <li>• 7-9= 16-20 points</li> <li>• 5-7= 11-15 points</li> <li>• &lt;4 = Up to 10 points</li> </ul> <p><b>ORGANIZATION CHART PROVIDED:</b>  <b>YES = 2 POINTS</b>  <b>NO = 0 POINTS</b></p>		
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<p>(c) Provide an organizational chart including the Project Manager, their support team, and the general corporate hierarchy.</p>	<p><b>MAXIMUM OF 30 POINTS</b></p>		
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**OVERALL PROPOSAL**

<p>R5. The bidder should demonstrate an overall understanding of the Statement of Work and the objectives of the project.</p> <p><i>Points will be awarded based on the proposal's clarity, comprehensiveness, and ability to address challenges/issues of the project.</i></p>	<p>Quality of proposal:</p> <ul style="list-style-type: none"> <li>-Bidder's proposal demonstrates a high level of clarity, detail, and comprehensiveness regarding how challenges/issues will be addressed. Further, past examples are provided. = 15-20 points</li> <li>-Bidder's proposal demonstrates an average level of clarity, detail, and comprehensiveness regarding how challenges/issues will be addressed and may/may not include examples. = 10-15 points</li> <li>-Bidder's proposal does not demonstrate sufficient clarity, detail, and comprehensiveness regarding how challenges/issues will be addressed = &lt;10 points</li> </ul> <p><b>MAXIMUM OF 20 POINTS</b></p>		
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<p>R6. The bidder should describe their proposed training program (both on-site and online, if provided) and the materials/resources they intend to use (include sample training materials, if available).</p> <p><i>Points will be awarded based on the comprehensiveness, user-friendliness, and suitability of the proposed training program to the services outlined in the Statement of Work. .</i></p>	<p>Quality and Comprehensiveness of Training Program:</p> <ul style="list-style-type: none"> <li>-Very comprehensive, detailed, exceptionally user-friendly, and meets all of the Embassy's stated requirements = 10 points</li> <li>-Comprehensive and user-friendly, some details missing and does not fully meet all of the Embassy's state requirements = 5 points</li> <li>-Program does not meet the Embassy's requirements = 0 points</li> </ul>	
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			<b>(MAXIMUM OF 10 POINTS)</b>
<b>SCHEDULE AND METHODOLOGY</b>			
<p>R7. The bidder should provide</p> <p>(a) a detailed transition plan from the current “hosted” solution state to an alternate “hosted” solution state.</p> <p>(b) The ‘plan’ should clearly define processes and overall schedules.</p> <p>(c) The transition plan should include clear and measurable benchmarks, deliverables, timelines, issues, and methodology from: Contract award to “Go-live” date for websites (French and English simultaneously)</p> <p>(d) Plan and schedule for development of e-newsletter template</p> <p><i>Points will be awarded based on the clarity, comprehensiveness, and feasibility of the proposed schedule and project plan.</i>  <u>Points will be deducted if the overall schedule exceeds two months.</u></p> <p>Up to 24 months -0 points deducted.  24-30 months - 5 points deducted  30-36 months - 10 points deducted  36-40 months - 20 points deducted</p>	<p>-Clear, concise and highly detailed with a comprehensive schedule that addresses milestones, is feasible, and meets project timelines.  <b>15-20 points</b></p> <p>-Is detailed and has a comprehensive schedule but would benefit from further details with respect to schedule, deliverables, methodology, and/or feasibility . The client has questions with regards to clarity and the project time-line.  <b>10-14 points</b></p> <p>-Schedule lacks significant detail with respect to schedule, deliverables, methodology, and/or feasibility .  <b>0-9 points</b></p> <p><b>(Maximum 40 points)</b></p>		