

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

**Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC**

**11 Laurier St. / 11, rue Laurier**

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
Services Canada**

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: Travaux Publics et Services  
Gouvernementaux Canada**

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**

<b>Title - Sujet</b> Events Planning and Management	
<b>Solicitation No. - N° de l'invitation</b> 82082-160083/A	<b>Date</b> 2015-08-31
<b>Client Reference No. - N° de référence du client</b> 82082-16-0083	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CX-028-67897	
<b>File No. - N° de dossier</b> cx028.82082-160083	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-09-18</b>	<b>Time Zone Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Baxter, Emily	<b>Buyer Id - Id de l'acheteur</b> cx028
<b>Telephone No. - N° de téléphone</b> (613) 949-1285 ( )	<b>FAX No. - N° de FAX</b> (613) 991-5870
<b>Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:</b> CANADIAN RADIO-TELEVISION AND TELECOMMUNICATIONS COMMISSION LTC CENTRAL BLDG 1 PROMENADE DU PORTAGE Gatineau Quebec K1A0N2 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du**

**fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Communication Procurement Directorate/Direction de  
l'approvisionnement en communication

360 Albert St. / 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

<b>Delivery Required - Livraison exigée</b> See Herein	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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## **PART 1 - GENERAL INFORMATION**

### **1.1 Statement of Work**

The Work to be performed is detailed under Article 6.2 of the resulting contract clauses.

### **1.2 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 from receipt of the results of the bid solicitation process. The debriefing will be in writing.

### **1.3 Trade Agreements**

The requirement is subject to the provisions of the Agreement on Internal Trade (AIT).

### **1.4 Canadian Content**

The requirement is limited to Canadian goods and/or services.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

### 2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

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

#### **Former Public Servant in Receipt of a Pension**

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

If so, the Bidder must provide the following information, for all 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 [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

#### **Work Force Adjustment Directive**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes** ( ) **No** ( )

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

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## 2.4 Enquiries - Bid Solicitation

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

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

## 2.5 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.

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

### **3.1 Bid Preparation Instructions**

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

- Section I:        Technical Bid (Five [5] hard copies)
- Section II:       Financial Bid (One [1] hard copy)
- Section III:      Certifications (One [1] hard 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 [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<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 explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

#### **Section II: Financial Bid**

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

#### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.



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

### **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.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### **4.1.1 Technical Evaluation**

##### **4.1.1.1 Mandatory Technical Criteria**

### **M.1 FINANCIAL PROPOSAL**

The Bidder MUST submit a financial proposal with a total price not exceeding **\$350,000.00** (applicable taxes are extra, as appropriate), all travel and living expenses included.

The Bidder's financial proposal must include the following:

M.1.a: The firm price (**excluding travel and living expenses**) to complete all of the obligations under the Contract \$\_\_\_\_\_ (applicable taxes are extra);

M.1.b: The ceiling price for **all travel and living expenses**, including all travel and living expenses associated with attending mandatory meetings \$\_\_\_\_\_ (applicable taxes are extra.).

### **M.2 EXPERIENCE OF THE FIRM**

The Bidder must:

- Have been in business for a minimum of five (5) years, including a minimum of three (3) years specializing in the provision of event management services; and
- Have a physical place of business within Canada.

The Bidder must provide, in writing:

1. The number of years the firm has been in business; and
2. The number of years the firm has specialized in the provision of event management services; and
3. The physical address(es) of the firm's place(s) of business within Canada (including street address, city/town and province/territory for each).

### **M.3 EVENT MANAGEMENT PROJECTS**

The Bidder must provide a detailed description of three (3) event management project samples, including a minimum of two (2) project samples with notable international participation. For the purposes of this requirement, "notable international participation" means the participation of a minimum of three (3) non-Canadian speakers per event management project sample.

The total number of event management project samples should not exceed three (3). If more than three (3) samples are provided, only the first three (3) samples will be evaluated.

The event management project samples must demonstrate the experience of the Bidder. **Project samples submitted in which the work was performed by one (1) or more of the Bidder's resources on behalf of another firm will not be accepted.**

The event start date for each event management project sample must have been after July 1, 2008.

The event location for each event management project sample must have been within Canada.

For at least two (2) of the events, the firm's assigned portion of the overall budget must have been at least \$250,000.00 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes).

For at least two (2) of the events, a minimum of 100 participants, including at least five (5) high-profile participants, must have attended the event. "High-profile participant" is defined as renowned experts, innovators, gurus, nationally or internationally recognized entrepreneurs, opinion leaders, celebrities, etc.

For each event management project sample, one (1) or more of the Bidder's resources must have been on-site for a minimum of two (2) days. "Resources" for the purposes of this RFP are defined as a Senior Event Manager, Event Manager or/and Event Coordinator. "On-site" is defined as at the event location(s) and/or traveling with the event participants.

For at least two (2) of the event management project samples, the provision of the following services must have been required: planning, accommodations, registration, hospitality, and transportation.

*Response Format:*

The Bidder must provide a description of each of the three (3) event management project samples. The information provided must demonstrate that the three (3) event management project samples meet M.3.

For **each** sample the Bidder must provide the following information:

- a. Name of the project/event;
- b. Client (Organization/firm, etc);
- c. Event start date; (Month, Year)
- d. Event location;
- e. Bidder's assigned portion of the overall budget (including professional fees, direct expenses, Sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);
- f. Number of participants in attendance;
- g. Profile of high-profile participants in attendance. i.e. Private sector, public sector, ranks or positions, and country(ies) of origin;
- h. Number of days one (1) or more of the Bidder's resources were on-site
- i. List of event management services provided.

The Bidder must provide a letter of reference for **each** event management project sample submitted. Each letter of reference must be from the client for the event management project sample and must be addressed to the Bidder. The letter must demonstrate the client's satisfaction with the performance of the Bidder.

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#### **4.1.1.2 Point Rated Technical Criteria**

### **R.1 APPROACH, METHODOLOGY, and PROJECT MANAGEMENT PLAN (Maximum of 60 points)**

The Bidder should submit a detailed work plan to describe the methodology that it will use to plan, organize, and manage the Summit on the Discoverability of Audio-Visual content as identified in Annex A "Statement of Work".

The Bidder should also provide details to describe the most effective methods to communicate with the target audiences.

The description should outline any challenges in meeting the overall Discoverability Summit objectives of "helping solve the challenge of audiovisual content discoverability" and ensure that questions such as: "How do producers bring content to viewers' attention? How do we create links that connect viewers with the content they want to watch when faced with an overabundance of content?" are answered.

#### **R.1.1 Project Approach and Methodology (Maximum of 30 points, Minimum of 24 points)**

The Bidder must provide a detailed creative approach and methodology based on the requirements within the Statement of Work regarding the Summit format. The Summit should not be a typical conference or event. It should provide participants with an array of non-traditional experiences, such as interactive hands-on demonstrations, exhibits, collaborative workshops, and break-out sessions.

The Bidder must supply an outline of their recommended approach and methodology for the Discoverability Summit.

At a minimum, the following criteria will be evaluated: your approach (is it creative, innovative or appropriate), your understanding of the Discoverability Summit's scope and challenges and the quality and effectiveness of the proposed non-traditional experiences.

#### **R.1.2 Project Management Plan (Maximum of 30 points, Minimum of 24 points)**

The Bidder should provide a detailed description of the proposed project management plan and the procedures, schedule controls, as well as the tools and techniques that will be used to plan, organize and manage the Discoverability Summit. The plan must provide flexibility and take into account client needs.

The Bidder should provide a detailed description of the Bidder's procedures to identify risks associated with each element of the Discoverability Summit as outlined in the Statement of Work.

The description of the project management approach should demonstrate how the Bidder will ensure that performance, quality, and the scheduled goals for the Discoverability Summit are achieved.

The description of the project management approach should demonstrate how the Bidder proposes to work in collaboration with the Project Authority for the development of the Discoverability Summit.

The description should outline the key areas of the Discoverability Summit that require input from the CRTC.

*Percentage factors utilized for the evaluation of R.1.1 & R.1.2:*

0	Unsatisfactory	<ul style="list-style-type: none"> <li>- Information was not provided</li> <li>· Few elements present</li> <li>· Not all elements are described or are poorly described</li> <li>· Not enough details are provided to assess how the bidder's approach and methodology will be used to meet to the requirements as described in Annex A - Statement of Work.</li> </ul> <p>OR</p> <p>Details do not provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and/or how to effectively communicate with it.</p> <p>OR</p> <p>The description does not outline any challenges in meeting the CRTC's Summit objectives or does not provide any solutions.</p>
0.8	Good	<ul style="list-style-type: none"> <li>· Most elements present</li> <li>· Most elements are well described</li> <li>· Details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate.</li> <li>· The description provides details to outline the challenges in meeting the CRTC's Summit objectives with some solutions.</li> </ul>
0.9	Very Good	<ul style="list-style-type: none"> <li>· All elements present</li> <li>· Most elements are well described</li> <li>· Substantial details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> </ul> <p>The description provides details to outline the challenges in meeting the CRTC's Summit objectives with solutions.</p>
1	Excellent	<ul style="list-style-type: none"> <li>· All elements present</li> <li>· All elements are well described</li> <li>· Substantial details provide evaluators with a clear understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> <li>· The description provides clear details to outline the challenges in meeting the CRTC's Summit objectives with well thought-out solutions.</li> </ul>

#### 4.1.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

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## 4.2 Basis of Selection

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 80 percent of the points for each rated criteria and an overall passing mark of 48 points for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **60 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 does not exceed the budget available for this requirement.

Where two (2) or more proposals achieve the identical highest number of points, the proposal with the lowest total price will be recommended for award of a contract.

All proposals will become the property of the Crown, they will not be returned.

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether 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 will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

#### 5.1.1 Declaration of Convicted Offences

As applicable, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide with its bid, a completed [Declaration Form](http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to be given further consideration in the procurement process.

### 5.2 Certifications Precedent to Contract Award and Additional Information

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

#### 5.2.1 Integrity Provisions – List of Names

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

#### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

## **5.2.3 Additional Certifications Precedent to Contract Award**

### **5.2.3.1 Canadian Content Certification**

This procurement is limited to Canadian services.

The Bidder certifies that:

( ) the service offered is a Canadian service as defined in paragraph 2 of clause [A3050T](#).

Bidders should submit this certification completed with their bid. If the certification is not completed and submitted with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to submit this completed certification. Failure to comply with the request of the Contracting Authority and submit the completed certification will render the bid non-responsive.

**5.1.3.1.1.** SACC Manual clause [A3050T](#) (2010-01-11) Canadian Content Definition.

### **5.2.3.2 Language Certification - Firm**

The Bidder must confirm that the firm is capable of providing all services in one of Canada's official languages (English or French). The Bidder must also confirm that the firm is capable of providing services on-site\* in both official languages (English and French).

\* "On-site" is defined as at the event location(s) and/or traveling with the event participants.

As such, the Bidder must include a duly signed and dated copy of the following certification:

The Bidder hereby certifies that its firm is capable of providing all services in at least one of Canada's official languages (English or French) and that its firm is capable of providing services on-site in both official languages (English and French).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## **PART 6 - RESULTING CONTRACT CLAUSES**

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

### **6.1 Security Requirements**

**6.1.1** There is no security requirement applicable to this Contract.

### **6.2 Statement of Work**

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

### **6.3 Standard Clauses and Conditions**

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

#### **6.3.1 General Conditions**

[2010B](#) (2015-07-03) General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

#### **6.3.2 Supplemental General Conditions**

4007 (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information, applies to and forms part of the Contract.

### **6.4 Term of Contract**

#### **6.4.1 Period of the Contract**

The period of the Contract is from date of Contract to August 31, 2016 inclusive

### **6.5 Authorities**

#### **6.5.1 Contracting Authority**

The Contracting Authority for the Contract is:

Emily Baxter  
Public Works and Government Services Canada  
Acquisitions Branch  
Communication Procurement Directorate  
360 Albert St., Ottawa, ON  
K1A 0S5



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cx028  
CCC No./N° CCC - FMS No./N° VME

Telephone: 613-949-1285  
Facsimile: 613-991-5870  
E-mail address: Emily.baxter@pwgsc-tpsgc.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.

### 6.5.2 Project Authority

The Project Authority for the Contract is:

TBD

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.

### 6.5.3 Contractor's Representative

TBD

## 6.6 Proactive Disclosure of Contracts with Former Public Servants

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

## 6.7 Payment

### 6.7.1 Basis of Payment

### 6.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ \_\_\_\_\_. Customs duties are excluded and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- a. when it is 75 percent committed, or

- b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
- 3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### **6.7.3 Multiple Payments**

Canada will pay the Contractor upon completion and delivery of Work in accordance with the payment provisions of the Contract if:

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

### **6.7.4 SACC Manual Clauses**

SACC Manual clause A9117C (2007-11-30) T1204 - Direct Request by Customer Department  
SACC Manual Clause C0705C (2010-01-11) Discretionary Audit

## **6.8 Invoicing Instructions**

1. 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.

Each invoice must be supported by:

- a. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
2. Invoices must be distributed as follows:
    - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
    - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## **6.9 Certifications**

### **6.9.1 Compliance**

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing additional 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 additional information, or if it is determined that any certification made by

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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.

### **6.9.3 SACC Manual Clauses**

*SACC Manual* clause A3050T (2010-01-11) Canadian Content Definition.

### **6.10 Applicable Laws**

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

### **6.11 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.

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4007 (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information
- (c) the general conditions 2010B (2015-07-03) General Conditions - Professional Services (Medium Complexity)
- (d) Annex A, Statement of Work;
- (e) the Contractor's bid dated \_\_\_\_\_ (*insert date of bid*)

### **6.12 Insurance**

*SACC Manual* clause G1005C (2008-05-12), Insurance

## ANNEX "A"

### STATEMENT OF WORK

Title: CRTC Discoverability Summit

#### 1.0 INTRODUCTION

The Canadian Radio-television and Telecommunications Commission (CRTC) requires a contractor that will provide and deliver a full range of event planning and management services in the context of the CRTC Discoverability Summit.

#### 2.0 BACKGROUND AND OBJECTIVES

As the regulator of broadcasting in Canada, the CRTC recently conducted a comprehensive review of the Canadian television system, called *Let's Talk TV: A Conversation with Canadians*. The review enabled the CRTC to build a forward-looking framework to ensure Canada's television system can adapt to evolving technologies and viewing habits.

As part of the review, the CRTC recognized that we now live in an Age of Abundance where viewers are overwhelmed with audiovisual content choices, whether it's on TV, Netflix, YouTube or any other digital platform. Viewers no longer wonder "what's on?" but "what should I watch?" And the CRTC determined that for Canadian-made productions to succeed in this sea of digital content, they must be well-promoted and easily discovered by viewers, both within Canada and abroad. In this era, the traditional ways of discovering content won't cut it anymore. Therefore, the CRTC committed to hosting a Discoverability Summit to help unleash new ideas to connect viewers with content, and vice versa, in the digital world and to discuss and develop technical solutions to the challenge of discoverability.

While the CRTC's focus is mainly on Canadian programming, discoverability has become a challenge around the world and in many different industries, including but not limited to audiovisual content, music, publishing and retail sales. Some experts from these sectors and from other countries have been facing the challenge for longer and have already developed approaches that could be valuable to others. For example, major online companies such as Amazon and Netflix use technology every day to connect viewers with their content. They use complex algorithms to recommend content that consumers will likely enjoy: appliances, movies or books. But for television, this is a significant shift in mindset.

The purpose of the Discoverability Summit is to bring together high-profile innovators and experts from various fields around the world (i.e. public policy makers, engineers, scientists, psychologists, etc.) to help solve the challenge of audiovisual content discoverability and answer important questions that will help ensure the success of programming in this Age of Abundance, including: How do producers bring content to viewers' attention? How do we create links that connect viewers with the content they want to watch?

The Discoverability Summit is a unique, authoritative, world-class, international event. The event must be the first of its kind, focusing solely on the issue of discoverability and enabling experts from across the world to learn, engage and advance the issue in significant ways. It must not be a typical conference or event, where attendees listen to keynote speakers and panel discussions in a sparsely decorated hotel ballroom and where there is limited interaction between experts and participants. The Summit must bring

together the greatest minds and the experts to discuss forward-looking approaches to discovering content in this Age of Abundance. It must foster interaction, discussions, innovation and visionary thinking at all times. It must provide participants with an array of non-traditional experiences, such as interactive hands-on demonstrations and exhibits and collaborative workshops or break-out sessions, which must create the spark to ignite new ideas, new tools and new business models and identify real, tangible and implementable solutions to enhance discoverability for viewers. The format of the Summit should enable participants to challenge the status quo, pitch and debate new ideas and unleash new solutions. Possible subject areas could include:

- Buzz: what it is and how to make it
- Algorithms and recommendation systems
- Best in branding: development and loyalty
- Why they worked: best practices of successful products
- Leveraging communities of interest
- Awards as a form of promotion/curation of products
- Closing the deal: transforming a page view into a purchase
- Interactive storytelling as promotion
- Successful social media branding and strategies
- Viewer engagement: being part of the audiovisual content
- Measuring consumer interest and engagement
- The cutting edge: beyond just promotion
- All-platform programming: screen equality
- Case studies of successful discoverability campaigns
- The new advertising: programmatic and more

The uniqueness of the Summit's format, look and feel, combined with the high-profile innovators and experts must make the event authoritative and world-class. The Summit must be a forum for learning, creative discussion and generating momentum with respect to new strategies, tools, approaches and other activities.

Most of the participants (approximately 200 in total) should be able to actively share knowledge and experience as part of the Summit and should have a stake in any or all aspects of promotion, branding and/or consumer engagement from around the world.

"High-profile innovators and experts (participants)" may include:

- Internet innovators, entrepreneurs and gurus
- Tastemakers / Opinion Leaders / Celebrities
- Successful multi-platform creators
- Cutting-edge advertisers and branding experts
- Leading academics, behavioural scientists

### 3.0 DESCRIPTION OF WORK

The Contractor must deliver the CRTC Discoverability Summit: an international, ground-breaking, world-class event in May 2016, convening high-level innovators and experts from across the world to discuss forward-looking strategies and mechanisms to address the discoverability of audiovisual content. The Summit will take place in central Toronto, at an innovative and connected venue that provides cutting-edge audiovisual possibilities to be leveraged throughout the event. The Summit will last two days with a social event prior to the Summit, also to be planned and managed by the Contractor.

The Discoverability Summit must not to be a typical conference or event, where attendees listen to keynote speakers and panel discussions in a sparsely decorated hotel ballroom and where there is limited interaction between experts and participants. All aspects of the Summit—from the venue and invitations to the branding and program of the event—should demonstrate innovation and visionary thinking. This forum for learning and creative discussion should offer participants an array of non-traditional experiences, such as interactive hands-on demonstrations and exhibits and collaborative workshops or break-out sessions.

By the end of the Summit, participants will have learned about different consumer behaviours in the digital world and the technology-based approaches to discoverability being explored or adopted around the world. They will also have worked together to identify tangible solutions to enhance the discoverability of audiovisual content.

The CRTC Discoverability Summit will have been preceded by two smaller events (known as En route to the Discoverability Summit: Content in the Age of Abundance), one in Montreal and one in Vancouver, to initiate the conversation on the issue of discoverability and generate momentum for the main Discoverability Summit. The Contractor will be required to integrate the preliminary events (i.e. conversations, participation, etc.) into the CRTC Discoverability Summit (specific details regarding the preliminary events will be provided after Contract award.)

#### **4.0 SCOPE OF WORK**

The Contractor will be required to provide a full range of event planning and management services for the CRTC Discoverability Summit. More specifically, these services must include the following:

##### General Pre-Event Planning

- Establishing and clarifying event objectives—in collaboration with the CRTC and based partially on the preliminary events (En route to the Discoverability Summit: Content in the Age of Abundance)—and designing non-traditional and innovative program content and formats;
- Working with organizing groups and individuals at the CRTC to clarify the purpose, parameters, policies and procedures for the event;
- Preparing and/or executing a plan which meets the defined needs and operational environment of the CRTC;
- Providing advice on key decisions related to event design, objectives and content, negotiations, personnel, financial management, and contingencies; and
- Developing sponsorship program, negotiating and securing sponsorship, partnership and official supplier arrangements.

##### Specific Pre-Event Planning

- Developing a branding for the event, integrating the preliminary events (En route to the Discoverability Summit: Content in the Age of Abundance);
- Establishing and developing cutting-edge marketing and promotions, including—but not limited to—digital presence, such as website and social media, and all promotional material. The Contractor will be responsible for designing, developing and hosting the website for the CRTC Discoverability Summit. The website must be fully bilingual, accessible according to W3C standards and protect personal information according to Government of Canada standards;
- Recruiting event participants, including moderator(s) and up to twenty (20) high-profile participants/speakers, according to identified budget for speakers which will be provided after Contract award (speakers will be paid under separate contracts and the responsibility for issuing these contracts will lie with the CRTC);
- Establishing and coordinating registration procedures;

- Assisting the CRTC with program and session planning, including formatting, timelines, and agenda preparation;
- Arranging for the production, printing, and distribution of all relevant material, before, during and after the event;
- Arranging for the translation in both official languages of all relevant material for the event;
- Handling and planning for sensitive event topics;
- Developing logos, letterheads and signage (which must be in accordance with the Federal Identity Program);
- Developing floor plans and assigning exhibit space (both paid and unpaid);
- Prospecting and negotiating for services which will be required in order to execute this unique and leading-edge event; and
- Providing advice and managing protocol for dignitaries at the local, national or international level.

Transportation (for selected high-profile participants/speakers only)

- Researching and coordinating commercial or chartered air transportation, including group check-ins and boarding assistance;
- Researching and coordinating ground transportation;
- Arranging for transportation of event materials;
- Providing information on security requirements and procedures at commercial airports wherever required; and
- Researching and coordinating seats, meals, facilities, and related services for transportation.

Accommodations

- Block booking rooms at appropriate hotels (based on the profile and/or preferences of participants, and within a perimeter of 5 kilometers of the event);
- Providing information and instructions to delegates on using hotel phones/internet and the cost of other hotel services;
- Providing emergency currency exchange services; and
- Providing final rooming lists to hotels.

Venue and Related Services

- Arranging for the rental of a connected (video-conferencing, high speed internet, etc.) and innovative space for the event where cutting-edge audiovisual, lighting and multimedia possibilities can and will be leveraged (including identifying and negotiating with selected sites and facilities authorities). The CRTC must approve the proposed venue before finalizing contract arrangements;
- Conducting space planning, layouts and staging;
- Selecting and making provisions for facilitators/speakers;
- Arranging for notetakers;
- Arranging for live streaming of the events;
- Arranging and providing for on-site security during and after hours;
- Planning and managing audiovisual requirements;
- Provision of venue accoutrements (podiums, decorations, banners, tables, chairs, tents, etc);
- Arranging for a photographer and videographer; and
- Arranging and providing for support services such as a Business Service Centre (with fax, printer, monitor, internet capability, etc.) desk top publishing, conference publishers, IT hardware and software, and electronic polling.

On-Site Event Coordination Services

- Maintaining logistical control of events;
- Coordinating registration procedures (both paper-based and automated environments);
- Hiring, training, motivating, and leading volunteers;
- Briefing, directing and assisting the Client (CRTC) on-site;

- Managing exhibits and booth setup;
- Managing hospitality, food and beverage in accordance with Treasury Board's Directive on Travel, Hospitality, Conference and Event Expenditures; and
- Coordinating speakers/presenters/facilitators, notetakers, live streaming, simultaneous interpreters and translators, security staff, audio-visual staff, photographer/videographer.

#### Financial Management

- Establishing, monitoring and managing the financial objectives of the Summit;
- Following all applicable policies and regulations set out by Treasury Board, Privy Council Office, Canada Revenue Agency, Justice Canada, as well as the applicable trade agreements; and
- Establishing billing procedures, reviewing bills from subcontractors, and ensuring payments for expenses as required
- Budget and financial management relating to subcontracts.
- Provide bi-weekly financial updates to the CRTC as part of the reporting process.

#### Risk management

- Providing a detailed risk management plan during the early planning stages of the event, overseeing and modifying the plan as necessary during events, and updating the plan as required throughout the duration of the project.

#### Post-Event Reporting and Debriefing

- Preparing final report on the event including final expenses details against the budget;
- Debriefing the Project Authority and other clients officials regarding the final outcomes of the events, including lessons learned;
- Conduct follow-ups for registration, delegate services (summaries, delegate lists, event proceedings, etc.) via all means (paper, electronic, web); and
- Follow up with all suppliers for all billing, services, adjustments and final payments, with the exception of the contracts for the moderators and speakers to be managed and issued by the CRTC.

## **5.0 PERSONNEL REQUIREMENTS**

The following resources are required for the planning and management of the Discoverability Summit:

<b>Title</b>	<b>Description</b>
Senior Event Manager	Overseeing and leading the development and execution of the event and on-site management
Event Manager	Leading the development and execution of the event
Event Coordinator	Coordinating the execution of the event
Financial Manager	Providing all financial management services

## **6.0 DEPARTMENTAL SUPPORT**

The Project Authority will be responsible for written approvals of all work, receiving all final deliverables and verifying that value for money has been obtained. CRTC will apply an approval process to draft and final versions of the deliverables. The approval process will take a maximum of two weeks. Final approval cannot be obtained until the Project Authority signs off. Once this occurs, the Project Authority will communicate approval to the Contractor.

The Project Authority will be:



- Responsible for coordinating the overall project, providing direction and guidance to the Contractor, and accepting and approving the Contractor deliverables on behalf of the CRTC
- Screen and review material and work with the Contractor to revise and enhance the material according to the agreed upon processes and timelines
- Monitor progress, give required direction and provide timely feedback
- Obtain approvals from CRTC management and internal clients, as required
- Provide the contractor, as required:
  - Canada Wordmark and CRTC corporate identities
  - Other background material as deemed relevant by the Project Authority

## 7.0 DELIVERABLES AND ASSOCIATED SCHEDULE

### The Contractor must provide:

#### One month from contract award

- Development of branding for the Summit based on En route to the Discoverability Summit: Content in the Age of Abundance (presentation to Client of mock-ups for two branding options)

#### October 2015

- Design and conceptualization of event (presentation with visual support to Client, written strategy in an MS Word document and implementation throughout)
- Marketing and digital strategy (presentation with visual support to Client, including mock-ups for each marketing and promotional concepts, written strategy in an MS Word document and implementation and production throughout)
- Initial digital/promotional material (i.e. website) (presentation of wireframes of website design and information architecture to Client)
- Fully designed and accessible website (static pages and secure and protected registration process)
- Venue(s) secured (written contract signed by both parties)

#### November 2015

- List of secured sponsorship (arrangements in which a third party will provide the CRTC with financial resources or in-kind assistance to support the Discoverability Summit and/or the social event prior to the Summit) and partnership (MS Word document with written confirmations of sponsorship and partnership)

#### November/December 2015

- Event Agenda/Program content (electronic versions ready for distribution)
- List of participants, including moderator(s) and up to twenty (20) high-profile participants/speakers (MS Word document)
- List of secured keynote speakers, high-profile participants and moderator(s) (MS Word document with written confirmations of booking/participation)

#### January 2016

- Communication packages to participants, including invitations, program agenda, event details, biographies, conference and reading material (electronic and hard copies ready for distribution)
- Delivery of remaining digital/promotional material

#### May 2016 (date to be confirmed)

- CRTC Discoverability Summit, including social event

#### June 2016

- Final report (presentation to Client and written report in an MS Word document)

## 8.0 LANGUAGE OF WORK

The working language for the work will be primarily in English.

The Contractor will be required to provide services in both official languages at the Summit. One or more of the proposed resources must be capable of providing services in both official languages.

## 9.0 LOCATION OF WORK

The Contractor may perform most of the work from their offices. While meetings via teleconference and/or web conference will be organized whenever possible, the Contractor may be required to travel to CRTC offices in Gatineau, QC up to a maximum of five (5) times for planning meetings and progress briefing sessions and to the event locations to provide on-site services during the event. The Contractor may also be required to travel with or without the Client (CRTC) on reconnaissance and advance trips to event locations.

All travel must have the prior authorization of the CRTC Representative.

All payments are subject to government audit.

## 10.0 APPLICABLE POLICIES

In performing the work outlined in the Annex A Statement of Work, the Contractor must adhere to the following policies:

1. Communications Policy of the Government of Canada: [http://www.tbs-sct.gc.ca/pubs\\_pol/sipubs/comm/siglist-eng.asp](http://www.tbs-sct.gc.ca/pubs_pol/sipubs/comm/siglist-eng.asp)
2. The Federal Identity Program Policy (Section 5(6) and Appendix A, subs-section 3.2, 3.3): [http://www.tbs-sct.gc.ca/pubs\\_pol/sipubs/tb\\_fip/fippcim2\\_e.asp#polic](http://www.tbs-sct.gc.ca/pubs_pol/sipubs/tb_fip/fippcim2_e.asp#polic)
3. Treasury Board Standard on Web Accessibility: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601&section=text>
4. The Contracting Policy: [www.tbs-sct.gc.ca/pubs\\_pol/dcgpubs/contpolnotices/siglist\\_e.asp](http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/contpolnotices/siglist_e.asp)
5. Treasury Board's Directive on Travel, Hospitality, Conference and Event Expenditures: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>
6. National Joint Council Travel Directive: <http://www.njc-cnmc.gc.ca/directive/travel-voyage/index-eng.php>
7. The Official Languages Act (Part II, section 11 and Part IV, section 30): <http://laws-lois.justice.gc.ca/eng/acts/O-3.01/>
8. The Privacy Act: [http://privcom.gc.ca/legislation/02\\_07\\_01\\_e.asp](http://privcom.gc.ca/legislation/02_07_01_e.asp)

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## **ANNEX "B"**

### **BASIS OF PAYMENT**

Bidders must submit all prices in Canadian dollars, including FOB destination, and custom duties, if applicable. The Goods and services Tax or Harmonized Sales Tax, if applicable, are extra.

The Bidder must provide firm all-inclusive prices for each of the Categories of Service (Project Steps) included in Tables B.1 below.

The firm all-inclusive prices include the cost of labour, fringe benefits, general and administrative expenses, time in transit, overhead, profit and the like, excepting only Applicable Taxes.

The Contractor is subject to the Applicable Laws as outlined in article 10 of the Resulting Contract. As such, the Contractor is responsible for ensuring adherence to these Laws, including any applicable Labour Laws. The firm fixed all-inclusive prices charged by the Contractor reflect this responsibility and Canada will not be subject to additional charges not expressly laid out herein.

There is no provision for overtime under this Contract.

Failure to price any of the categories of service included in Table B.1, will result in a bid being declared non-responsive.

For table B.1 the breakdown of the pricing for the categories of service must equal one hundred percent (100%). Failure to remain within the provided percentage ranges for any of the categories of service will result in a bid being declared non-responsive.

#### **Direct Expenses**

All direct expenses, including all general and administrative expenses, normally incurred in providing the services (i.e. project office space [including Contractor's hardware and software]; word processing; non-project specific reports, photocopying, courier and telephone charges; local travel and the like) must be included in the firm all-inclusive prices in Table B.1. No other charges will be permitted under the Contract.

Direct expenses include any expenses directly incurred by the Contractor during the performance of the Work or for the purpose of the project, relating to the purchase or rental of materials, equipment, supplies, or other required items. Direct expenses may include, but are not limited to, the following: badges; lanyards; tent cards; flip charts; on-site printing; signage; audio/video equipment rental; simultaneous interpretation equipment rental; commercial transportation; requirement-specific insurance coverage (at the request of the Project Authority); and any project-specific photocopies, telephone and facsimile charges, parking costs, and mailing, courier, and shipping fees.

#### **Subcontracting**

All subcontracted requirements must be included in the firm all-inclusive prices in Table B.1. No other charges will be permitted under the Contract.

#### **Travel and Living Expenses**

All travel and living expenses must be included in the firm all-inclusive prices in Table B.1. No other charges will be permitted under the Contract.

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## Hospitality

All expenses related to hospitality requirements must be included in the firm all-inclusive prices in Table B.1. No other charges will be permitted under the Contract.

### Table B.1 – Event Management Services

The firm all-inclusive prices must include all activities, materials and costs associated with the provision of the services as specified in the Annex A Statement of Work.

CATEGORIES OF SERVICE (PROJECT STEPS)	FIRM PRICE
1) Administration	\$
2) Artistic (Including but not limited to artistic direction and coordination, décor, multimedia, video, rights and clearances)	\$
3) Technical (Including but not limited to : technical direction and coordination, lighting, sound, rigging, electrical)	\$
4) Production and Logistics Including but not limited to production direction and coordination, catering, office needs, logistics, transport, hotels)	\$
<b>TOTAL ALL INCLUSIVE COST OF THE EVENT</b> (must be no more than \$350,000.00 excluding applicable taxes)	\$

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**ANNEX "C"**  
**EVALUATION GRIDS**

EVALUATION SUMMARY	
<b>MANDATORY REQUIREMENTS:</b> <input type="checkbox"/> MET <input type="checkbox"/> NOT MET	
<b>Mandatories Checked by:</b>	<b>Date:</b>
<b>RATED REQUIREMENTS</b>	<b>SCORE ACHIEVED</b>
<b>R.1    APPROACH, METHODOLOGY, and PROJECT MANAGEMENT PLAN</b>	
<b>R.1.1    PROJECT APPROACH AND METHODOLOGY</b>	____ / 30 points
<b>R.1.2    PROJECT MANAGEMENT PLAN</b>	____ / 30 points
<b>OVERALL TOTAL</b>	____ / 60 points
<b>Overall Comments:</b>	

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**EVALUATION TEAM SIGNATURES:**

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

**NOTE TO EVALUATORS:** This evaluation grid contains the basic criteria. This grid must be used in conjunction with the RFP document to ensure the evaluation is being conducted strictly in accordance with the published criteria.

Evaluation Criteria	Met	Not met
<b>M.1 FINANCIAL PROPOSAL</b>		
The Bidder MUST submit a financial proposal with a total price not exceeding <b>\$350,000.00</b> (applicable taxes are extra, as appropriate), all travel and living expenses included.  The Bidder's financial proposal must include the following:  M.1.a: The firm price ( <b>excluding travel and living expenses</b> ) to complete all of the obligations under the Contract \$_____ (applicable taxes are extra);  M.1.b: The ceiling price for <b>all travel and living expenses</b> , including all travel and living expenses associated with attending mandatory meetings \$_____ (applicable taxes are extra.).		
<b>Comments:</b>		

Evaluation Criteria	Met	Not met
<b>M.2 EXPERIENCE OF THE FIRM</b>		
The Bidder must:  <ul style="list-style-type: none"> <li>Have been in business for a minimum of five (5) years, including a minimum of three (3) years specializing in the provision of event management services; and</li> <li>Have a physical place of business within Canada.</li> </ul> The Bidder must provide, in writing:  <ol style="list-style-type: none"> <li>The number of years the firm has been in business; and</li> <li>The number of years the firm has specialized in the provision of event management services; and</li> <li>The physical address(es) of the firm's place(s) of business within Canada (including street address, city/town and province/territory for each).</li> </ol>		
<b>Comments:</b>		

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Evaluation Criteria	Met	Not Met
<p><b>M.3 EVENT MANAGEMENT PROJECTS</b></p> <p>The Bidder must provide a detailed description of three (3) event management project samples, including a minimum of two (2) project samples with notable international participation. For the purposes of this requirement, "notable international participation" means the participation of a minimum of three (3) non-Canadian speakers per event management project sample.</p> <p>The total number of event management project samples should not exceed three (3). If more than three (3) samples are provided, only the first three (3) samples will be evaluated.</p> <p>The event management project samples must demonstrate the experience of the Bidder. <b>Project samples submitted in which the work was performed by one (1) or more of the Bidder's resources on behalf of another firm will not be accepted.</b></p> <p>The event start date for each event management project sample must have been after July 1, 2008.</p> <p>The event location for each event management project sample must have been within Canada.</p> <p>For at least two (2) of the events, the firm's assigned portion of the overall budget must have been at least \$250,000.00 (including professional fees, direct expenses, sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes).</p> <p>For at least two (2) of the events, a minimum of 100 participants, including at least five (5) high-profile participants, must have attended the event. "High-profile participant" is defined as renowned experts, innovators, gurus, nationally or internationally recognized entrepreneurs, opinion leaders, celebrities, etc.</p> <p>For each event management project sample, one (1) or more of the Bidder's resources must have been on-site for a minimum of two (2) days. "Resources" for the purposes of this RFP are defined as a Senior Event Manager, Event Manager or/and Event Coordinator. "On-site" is defined as at the event location(s) and/or traveling with the event participants.</p> <p>For at least two (2) of the event management project samples, the provision of the following services must have been required: planning, accommodations, registration, hospitality, and transportation.</p> <p><i>Response Format:</i></p> <p>The Bidder must provide a description of each of the three (3) event management project samples. The information provided must demonstrate that the three (3) event management project samples meet M.3.</p> <p>For <b>each</b> sample the Bidder must provide the following information:</p>		



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<ul style="list-style-type: none"><li>a. Name of the project/event;</li><li>b. Client (Organization/firm, etc);</li><li>c. Event start date; (Month, Year)</li><li>d. Event location;</li><li>e. Bidder's assigned portion of the overall budget (including professional fees, direct expenses, Sub-contracted expenses, travel and living expenses, and any other project-related revenues, as applicable, but excluding applicable taxes);</li><li>f. Number of participants in attendance;</li><li>g. Profile of high-profile participants in attendance. i.e. Private sector, public sector, ranks or positions, and country(ies) of origin;</li><li>h. Number of days one or more of the Bidder's resources were on-site</li><li>i. List of event management services provided.</li></ul> <p>The Bidder must provide a letter of reference for <b>each</b> event management project sample submitted. Each letter of reference must be from the client for the event management project sample and must be addressed to the Bidder. The letter must demonstrate the client's satisfaction with the performance of the Bidder.</p>		
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#### 4.1.1.2 POINT RATED TECHNICAL CRITERIA

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. To be considered compliant, bidders must obtain the required minimum of 80 percent of the points for each rated criterion and an overall passing mark of 48 points. The rating is performed on a scale of 60 points. **Proposals scoring less than 80 percent in any one (1) of these criterion will not be given further consideration.**

*NOTE: Percentage factors will be the basis used to allocate points for all rated requirements. The number of points will be calculated depending on the total value given for each criterion. For example, if evaluators give 0.8 as a score for R.1 (60 points X 0.8 = 48 points), this is equal to 80% of the total value given for that criterion. Evaluators cannot deviate from the established scoring grid. For example, evaluators cannot give a score of 0.85 (85%). Evaluators would have to choose between a 0.8 or a 0.9 (80% or 90%).*

#### **INSTRUCTIONS TO EVALUATORS**

**PLEASE READ THE FOLLOWING CAREFULLY AND IN ITS ENTIRETY PRIOR TO COMMENCING THE EVALUATION OF THE RATED REQUIREMENTS.**

1. The following scoring grid will be used for the evaluation of the rated criteria.
2. ONLY the Percentage Factors indicated in the table are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available Percentage Factors: 1, 0.9, 0.8, and 0. Factors such as 0.65, 0.85, etc. MUST NOT be used.
3. The "Points" and "Total Points" boxes in the grids will be calculated based on the Percentage Factor(s) assigned. Evaluators MUST NOT select a number for "Points" which does not correspond to a Percentage Factor. For example, 3/10 is not an acceptable score as 0.3 is not an available an available number.

**R.1 APPROACH, METHODOLOGY, and PROJECT MANAGEMENT PLAN (Maximum 60 points - Minimum 48 points)**

The Bidder should submit a detailed work plan to describe the methodology that it will use to plan, organize, and manage the Summit on the Discoverability of Audio-Visual content as identified in Annex A "Statement of Work".

The Bidder should also provide details to describe the most effective methods to communicate with the target audiences.

The description should outline any challenges in meeting the CRTC's overall Discoverability Summit objectives of "helping solve the challenge of audiovisual content discoverability" and ensure that questions such as: "How do producers bring content to viewers' attention? How do we create links that connect viewers with the content they want to watch when faced with an overabundance of content?" are answered.

**R.1.1 Project Approach and Methodology (Maximum of 30 points, Minimum of 24 points)**

The Bidder must provide a detailed creative approach and methodology based on the requirements within the Statement of Work regarding the Summit format. The Summit should not be a typical conference or event. It should provide participants with an array of non-traditional experiences, such as interactive hands-on demonstrations, exhibits, collaborative workshops, and break-out sessions.

The Bidder must supply an outline of their recommended approach and methodology for the Discoverability Summit.

At a minimum, the following criteria will be evaluated: your approach (is it creative, innovative or appropriate), your understanding of the Discoverability Summit's scope and challenges and the quality and effectiveness of the proposed non-traditional experiences.

R.1.1 PROJECT APPROACH AND METHODOLOGY- Up to a maximum of 30 points			
Assessment of Criteria		Percentage Factor	Points
Criterion for an established minimum acceptable response (percentage factor of 0.8):			/ 30
<p><u>Not acceptable (0):</u></p> <ul style="list-style-type: none"> <li>Information was not provided</li> <li>Few elements present</li> <li>Not all elements are described or are poorly described</li> <li>Not enough details are provided to assess how the bidder's approach and methodology will be used to meet to the requirements as described in Annex A - Statement of Work.</li> </ul> <p>OR</p> <p>Details do not provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and/or how to effectively communicate with it.</p> <p>OR</p> <p>The description does not outline any challenges in meeting the CRTC's Summit objectives or does not provide any solutions.</p> <p><u>Good (0.8):</u></p> <ul style="list-style-type: none"> <li>Most elements present</li> <li>Most elements are well described</li> <li>Details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate.</li> </ul> <p>The description provides details to outline the challenges in meeting the CRTC's Summit objectives with some solutions.</p> <p><u>Very Good (0.9):</u></p> <ul style="list-style-type: none"> <li>All elements present</li> <li>Most elements are well described</li> <li>Substantial details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> </ul> <p>The description provides details to outline the challenges in meeting the CRTC's Summit objectives with solutions.</p> <p><u>Excellent (1):</u></p> <ul style="list-style-type: none"> <li>All elements present</li> <li>All elements are well described</li> <li>Substantial details provide evaluators with a clear understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> </ul> <p>The description provides clear details to outline the challenges in meeting the CRTC's Summit objectives with well thought-out solutions.</p>			
Comments:			Total Points / 30

### **R.1.2 Project Management Plan (Maximum of 30 points, Minimum of 24 points)**

The Bidder should provide a detailed description of the proposed project management plan and the procedures, schedule controls, as well as the tools and techniques that will be used to plan, organize and manage the Discoverability Summit. The plan must provide flexibility and take into account client needs.

The Bidder should provide a detailed description of the Bidder's procedures to identify risks associated with each element of the Discoverability Summit as outlined in the Statement of Work.

The description of the project management approach should demonstrate how the Bidder will ensure that performance, quality, and the scheduled goals for the Discoverability Summit are achieved.

The description of the project management approach should demonstrate how the Bidder proposes to work in collaboration with the Project Authority for the development of the Discoverability Summit.

The description should outline the key areas of the Discoverability Summit that require input from the CRTC.

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R.1.2 PROJECT MANAGEMENT PLAN - Up to a maximum of 30 points			
Assessment of Criteria		Percentage Factor	Points
Criterion for an established minimum acceptable response (percentage factor of 0.8):			/ 30
<p><u>Not acceptable (0):</u></p> <ul style="list-style-type: none"> <li>Information was not provided</li> <li>Few elements present</li> <li>Not all elements are described or are poorly described</li> <li>Not enough details are provided to assess how the bidder's approach and methodology will be used to meet to the requirements as described in Annex A - Statement of Work.</li> </ul> <p>OR</p> <p>Details do not provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and/or how to effectively communicate with it.</p> <p>OR</p> <p>The description does not outline any challenges in meeting the CRTC's Summit objectives or does not provide any solutions.</p> <p><u>Good (0.8):</u></p> <ul style="list-style-type: none"> <li>Most elements present</li> <li>Most elements are well described</li> <li>Details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate.</li> </ul> <p>The description provides details to outline the challenges in meeting the CRTC's Summit objectives with some solutions.</p> <p><u>Very Good (0.9):</u></p> <ul style="list-style-type: none"> <li>All elements present</li> <li>Most elements are well described</li> <li>Substantial details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> </ul> <p>The description provides details to outline the challenges in meeting the CRTC's Summit objectives with solutions.</p> <p><u>Excellent (1):</u></p> <ul style="list-style-type: none"> <li>All elements present</li> <li>All elements are well described</li> <li>Substantial details provide evaluators with a clear understanding of the methodology that the Bidder will use to plan, organize, and manage the Discoverability Summit for the target audience and how to effectively communicate with it.</li> </ul> <p>The description provides clear details to outline the challenges in meeting the CRTC's Summit objectives with well thought-out solutions.</p>			
Comments:			Total Points / 30