



<b>Request for Proposal Number:</b>	<b>NRCan-5000016275</b>
<b>Title:</b>	Hosting, operation and maintenance of the Equipment Division Contact Data Base (EDCDB)
<b>Date of Solicitation:</b>	10 July 2015 (Eastern Daylight Savings Time EDT)
<b>Solicitation Closing Date and Time:</b>	24 August 2015 at 2:00 P.M. (Eastern Daylight Savings Time EDT)
<b>Address Inquiries To Contracting Authority:</b>	<b>Valerie Holmes</b> Natural Resources Canada Senior Procurement Officer Fax: (613) 947-5477 Email: <a href="mailto:valerie.holmes@nrcan.gc.ca">valerie.holmes@nrcan.gc.ca</a>
<b>Security:</b>	There is not a security requirement associated with this solicitation.
<b>Send Proposal To:</b>	Natural Resources Canada Bid Receiving Unit, Mailroom 588 Booth street, Room 108 Ottawa, Ontario K1A 0Y7 Attention: <b>Valerie Holmes</b>

**PROCUREMENT BUSINESS NUMBER (PBN)** \_\_\_\_\_

In order to be able to receive a Natural Resources Canada (NRCan) contract, all suppliers **MUST** have a PBN. Companies who do not have a PBN **MUST** register for a PBN in the Supplier Registration Information system, on line at the Business Access Canada (formerly Contracts Canada) Internet site: [<Supplier Registration>](#)

**VENDOR/FIRM NAME AND FULL POSTAL ADDRESS (PLEASE PRINT):**

FIRM NAME: \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

CONTACT: \_\_\_\_\_  
 TELEPHONE: \_\_\_\_\_  
 FACSIMILE: \_\_\_\_\_  
 EMAIL: \_\_\_\_\_

**NAME AND TITLE OF PERSON AUTHORIZED TO SIGN ON BEHALF OF BIDDER (PLEASE PRINT):**

NAME: \_\_\_\_\_  
 TITLE: \_\_\_\_\_

**PROPOSAL TO: NATURAL RESOURCES 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 and on any attached sheets at the price(s) set out therefore.

**Signature of Person Authorized to Sign on behalf of Vendor/Firm:**

\_\_\_\_\_ **Date** \_\_\_\_\_



**REQUEST FOR PROPOSAL (RFP)**

**FOR**

**HOSTING, OPERATION AND MAINTENANCE OF THE EQUIPMENT DIVISION  
CONTACT DATA BASE (EDCDB)**

**FOR**

**NATURAL RESOURCES CANADA (NRCAN)**

A "Request for Proposal" (RFP) is the solicitation document used to seek proposals or bids from suppliers. The term "Bidder", also called the "Offeror", refers to the potential supplier submitting a proposal or a bid. **The Bidder submitting a proposal may, however, consist of several firms putting one proposal together as a joint venture. In the case of a joint venture, the combined experience of the firms forming the joint venture will be considered for the purposes of determining the Bidders' compliance to the Mandatory and Rated Requirements.**

Wherever the words "Proposal" or 'Bid' appear in this document", each shall be taken to mean the same as the other.

The MANDATORY REQUIREMENTS of this RFP are identified specifically with the words "MANDATORY", "MUST", "ESSENTIAL", "SHALL", "WILL", "IT IS REQUIRED", AND "REQUIRED". IF a MANDATORY REQUIREMENT is not complied with, the proposal will be considered NON-RESPONSIVE and will not receive any further consideration. In the context of this RFP, Non-Responsive, Non-Compliant and Non-Valid shall each be taken to mean the same as the other.

**NOTICE TO BIDDERS:** The following documents are enclosed and form part of this bid package:

**RFP #NRCan-5000016275**, including all Parts, Appendices and Annexes as listed in the Table of Contents below.

The Bidder acknowledges that all of the aforementioned documents were received in its bid package. It is the responsibility of the Bidder to verify the inclusion of all documents, and to obtain copies of any missing items by contacting the Contracting Authority (CA) as identified on Page 1 of this RFP. Failure to obtain any missing document(s) shall not relieve the Bidder from compliance with any obligation imposed by the RFP, nor excuse the Bidder from the guidelines set out therein.



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## PART 1: GENERAL INFORMATION

### 1. Introduction

The bid solicitation is divided into four (4) parts plus 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: 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 4: Resulting Contract Clauses:** includes the clauses and conditions that will apply to any resulting contract.

The Annexes include:

Annex "A" - Statement of Work,  
Annex "B" - Technical Evaluation Criteria,  
Annex "C" - Financial Proposal,  
Annex "D" - Certifications,

### 2. Summary

By means of this RFP, NRCan is seeking proposals from Bidders to take over the hosting, operation and maintenance of the Equipment Division Contact Data Base (EDCDB)

The period of the contract shall be for one year with the option to extend the period of the contract for up to three (3) additional twelve (12) month periods.

There is no security requirement associated with this requirement.

This requirement is subject to the provisions of the American Free Trade Agreement (NAFTA), the Agreement on Internal Trade (AIT), the Canada - Chile Free Trade Agreement (CCFTA) and the Canada-Peru Free Trade Agreement (CPFTA).

## PART 2: BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](#) issued by Public Works and Government Services Canada (PWGSC).

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.

In the complete context (**except Section 3**):

DELETE: Public Works and Government Services Canada (PWGSC)  
INSERT: Natural Resource Canada (NRCan)

**Section 1 - Integrity Provisions of 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements** is amended as follows:

DELETE: PWGSC  
INSERT: NRCan

**Section 2 - Procurement Business Number of 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements** is amended as follows:

DELETE: Suppliers are required to...  
INSERT: It is suggested that supplier are required to...

**Subsection 5.4 - Submission of Bids of 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements** is amended as follows:

DELETE: 60 days  
INSERT: 120 days

**Subsection 8.1 - Transmission by Facsimile of 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements** is amended as follows:

DELETE: (819) 997-9776  
INSERT: (613) 995-2920

**Subsection 20.2 - Further Information of 2003 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements** is amended as follows:

DELETE: in its entirety

### 2. Submission of Bids / Bid Receiving Unit Address

It is the Bidders responsibility to ensure that proposals are delivered to the following location, by the time and date indicated on page 1 of this RFP document:

Natural Resources Canada  
Bid Receiving Unit - Mailroom  
588 Booth Street, Room 108



Ottawa, Ontario K1A 0Y7  
**Attention: Valerie Holmes**

It is requested that the Bidder's name, return address, Request for Proposal Number, and Bid Closing Date appear legibly on the outside of the envelope containing the Bidder's proposal. Failure to do so may result in bids being misdirected. **NRCan will not assume responsibility for proposals directed to any other location.**

The onus is on the Bidder to ensure that the proposal is delivered to the location above. Not complying with the above instructions may result in NRCan's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

2.1 Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to NRCan will not be accepted.

### **3. Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than **three (3)** 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 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.

To comply with the [Code of Conduct for Procurement](#), bidders are obliged to alert the contracting authority to any factual errors that they discover in bid solicitations.

### **4. Security Requirement**

There is no security requirement associated with this solicitation.

### **5. Bidder Financial Capacity**

The Bidder may be required to provide, prior to contract award, specific information with respect to their legal and financial status, and their technical and financial capability to satisfy the requirements as stipulated in this RFP. If requested, financial information to be provided shall include, but not be limited to, the Bidder's most recent audited financial statements or financial statements certified by the Bidder's chief financial officer. Information requested by NRCan is to be provided by the Bidder as stipulated in the request by the Contracting Authority.

Should the Bidder provide the requested information to Canada in confidence, while indicating that the disclosed information is confidential, Canada will then treat the information in a confidential manner as provided in the Access to Information Act.

In the event that a proposal is found to be non-responsive on the basis that the Bidder is considered not to be financially capable of performing the subject requirements, official notification shall be provided to the Bidder by NRCan.



## 6. 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.

## 7. Disclosure of Information

Any information, data and/or Intellectual Property which is provided in a proposal and is demonstrably proprietary to a Bidder, shall be so identified specifically (by paragraph, table, figure) in the proposal, and Natural Resources Canada will endeavor to protect such proprietary information, data and/or Intellectual Property in accordance with the laws of Canada and its normal policies, regulations and procedures. Any financial data and information provided by Bidders for the purpose of this RFP will be treated as "Commercially Confidential" and kept in confidence by Natural Resources Canada unless expressly stated otherwise in this RFP. Such information will not be disclosed, in whole or in part, except on a need-to-know basis for the specific purpose of proposal evaluation and for the activities related to the process of contract award, as applicable. Unless it is required to do so by law, NRCan will not divulge such data and/or information to any third party.

## 8. Conflict of Interest

If NRCan determines the successful Bidder to be in a possible conflict of interest situation, the Bidder will be required, prior to entering into a contractual relationship with NRCan, to disclose any and all holdings and activities that could possibly be in a conflict, real or perceivable, with the mandate and objectives of NRCan. In the event that NRCan decides that action is necessary in order to remove such a conflict, the successful Bidder will be required to take such action (which may include divestiture of certain assets or ceasing to perform certain activities) prior to entering into a contractual relationship with NRCan.

## 9. Bidder's Teleconference

A bidders' teleconference will be held on **July 29, 2015**. The teleconference will begin at **1:30 p.m.**, by calling the following number: **(877) 412-4791** and entering the following access code: **4045644**. The scope of the requirement outlined in the bid solicitation will be reviewed during the conference and questions will be answered. It is recommended that bidders who intend to submit a bid attend or send a representative.

Bidders are requested to communicate with the Contracting Authority before the conference to confirm attendance. Bidders should provide, in writing, to the Contracting Authority, the names of the person(s) who will be attending and a list of issues they wish to table at least five (5) working days before the scheduled conference.

Any clarifications or changes to the bid solicitation resulting from the bidders' conference will be included as an amendment to the bid solicitation. Bidders who do not attend will not be precluded from submitting a bid.

## 10. Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- where the Foreground consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software





NRCan reserves the right to grant, upon written request, a license to exercise the required Intellectual Property Rights in such Canada-owned information to the successful Contractor.

For reference, the Treasury Board Site is: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=13697>

## 11. Bid Preparation Instructions

Natural Resources Canada encourages the use of recycled paper and **two-sided printing**. Reduction in the size of documents will contribute to Natural Resources Canada's sustainable development initiatives and reduce waste.

In support of the Policy on Green Procurement, it is requested that bidders provide their bid in separately bound sections as follows:

### HARD COPY:

**Section I:** Technical Bid - 4 copies (1 original, 3 copies)

**Section II:** Financial Bid - 1 copy, **under separate cover**. Prices related to the current solicitation must appear in the financial bid only and are not to be indicated in any other section of the bid; prices referenced in the financial bid should not to be repeated in any other section of the bid.

**Section III:** Certifications - 1 copy

OR:

### ELECTRONIC STORAGE MEDIA:

Since NRCan is working towards a greener environment by eliminating all hard copy file folders, we prefer to have all bids on a CD/DVD or USB. If you wish to submit in this format, please provide the following:

**Section I:** Technical Bid - 4 copies (1 original, 3 copies)

NOTE: 1 CD/DVD/USB will contain: 1 Technical, sole Financial Bid, Certifications and signed first page  
3 CD/DVD/USB will contain: just the Technical Bid

**Section II:** Financial Bid - 1 copy (included with original Technical Bid).

**Section III:** Certifications - 1 copy (included with original Technical Bid and sole Financial Bid)

**Note: NRCan will accept either Hard copy or Electronic Media submitted bids. However, it is our preference that bids be submitted on Electronic Storage Media to adhere to our Green Initiative.**

No payment shall be made for costs incurred by the Bidder in the preparation and submission of a proposal in response to this RFP.

All fees, associated with the transfer of data or of all documents as may be required by NRCan as part of the solicitation process, are the responsibility of the Bidder. No costs incurred by the Bidder before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resulting contract.

**NOTE: WHEN SUBMITTING A BID TO THIS SOLICITATION AND YOU USE A COURIER SERVICE, YOU ARE ADVISED TO WRITE THE BID SOLICITATION NUMBER, CLOSING DATE AND TIME ON THE FRONT OF THE COURIER PACKAGE; NOT JUST ON THE ENVELOPES WITHIN THE COURIER PACKAGE IN ORDER TO AVOID ANY UNCERTAINTY FROM OUR BID RECEIPT UNIT WHEN RECEIVING BIDS WITHOUT ANY INDICATION WHAT THEY ARE FOR.**

b) **Format of Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid:



- i. use 8.5 x 11 inch (216 mm x 279 mm) paper;
- ii. use a numbering system that corresponds to the bid solicitation;
- iii. 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
- iv. Include a table of contents.

c) **Canada's Policy on Green Procurement:** The policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process See the [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 are encouraged to:

- i. use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
- ii. 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.

## 1. Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders must demonstrate their capability and describe their approach in a thorough, concise and clear manner for successfully carrying out the work as described in the Annex "A" - Statement of Work".

Bidders must respond to government bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the bid or contract documents, and submit bids and enter into contracts only if they will fulfill all obligations of the contract.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient and may result in a loss of points. 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.

It is the responsibility of the Bidder to obtain clarification of the requirements contained in the RFP, if necessary, prior to submitting a proposal. The Bidder must provide sufficient details in its proposal to substantiate compliance with what is required; all professional experience must be fully documented and substantiated in the proposal(s).

In the event of a proposal submitted through contractual joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture. (All members of the joint venture shall be jointly and severally or solidarily liable for the performance of any resulting contract awarded as a result of a joint venture.)

## 2. Page 1 of the RFP Document

It is mandatory that all bidders sign their submitted proposal. It is requested that all bidders complete, sign and date Page 1 of this RFP (including the name of the submitting organization, the name of the authorized signing person, appropriate addresses, telephone and facsimile numbers and business contact) prior to submitting their proposal. As the signature indicates a clear acceptance of the terms and conditions set out in the RFP, it is the Bidder's responsibility to ensure that the signatory has the authority within its organization to commit the Bidder by making such a contractual offer.

As per article 1 of Part 2, the Bidder hereby agrees, by submitting his/her proposal in response to this RFP, to all the instructions, terms, conditions and clauses detailed herein.



**3. Section II: Financial Bid**

Bidders must submit their financial bid in accordance with Annex "C"- Financial Proposal. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

All bids are evaluated in Canadian currency. Therefore, for evaluation purposes, the noon rate quoted by the Bank of Canada as being in effect on date of bid closing will be applied as the initial conversion factor for the specified currency.

Canada will pay the exchange rate adjustment amount in Canadian currency using the prevailing noon rate on the date of payment by Canada.

**4. Section III: Certifications**

Bidders must submit the certifications as per Annex "D".



## PART 3: EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

- (a) Bids will be evaluated in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria and in conjunction with Annex "A" - Statement of Work;
- (b) If the Bidder is deemed non-responsive as a result of evaluation, the bid will be set aside and not considered for contract award.
- (c) The proposed successful bidder will be determined in accordance with the contractor selection method stated in this Part.
- (d) All proposals shall be treated as CONFIDENTIAL and will be made available only to those individuals authorized to participate in the evaluation process. All bidders will be subject to the terms of the *Access to Information Act* and to other applicable law or orders of courts or other tribunals having jurisdiction.
- (e) An evaluation team will evaluate the proposals on behalf of NRCan. While the evaluation team will normally be comprised of representatives of NRCan, it *may* also include representatives from other Government Departments and Agencies or third party participants as selected by NRCan.

### 2. Rights of NRCan

NRCan reserves the right to:

- seek clarification or obtain verification of statements made in a proposal;
- reject any or all proposals received in response to the bid solicitation;
- enter into negotiations with bidders on any or all aspects of their proposal;
- accept any proposal in whole or in part without prior negotiation;
- cancel the bid solicitation at any time;
- reissue the bid solicitation;
- verify any or all information provided by the Bidder with respect to the solicitation including references;
- retain all proposals submitted in response to the solicitation;
- declare a proposal non-responsive if NRCan determines during the evaluation phase that the Bidder does not have the legal status, the facilities or the technical, financial and/or managerial capabilities to fulfill the requirements stated herein;
- discontinue the evaluation of any proposal which is determined, at any stage of the evaluation process, to be non-responsive.

### 3. Basis of Selection

Only those bids that are deemed to be responsive (compliant) will be evaluated under the basis of selection:

#### Highest Combined Rating of Technical Merit and Price

The responsive (compliant) Bidder with the highest combined rating of technical merit **(70%)** and price **(30%)** will be recommended for award of a contract. See the following example table below.



Example of 70% Technical Merit and 30% Price Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Points Achieved by Bidder	88	82	76
Price Quoted by Bidder	\$85,000	\$80,000	\$75,000
CALCULATIONS			
	Technical Points Achieved	Rated Price Points Achieved	Total Points Achieved
Bidder 1	$\frac{88}{*88} \times 70 = 70.00$	$\frac{**75}{85} \times 30 = 26.47$	96.47
Bidder 2	$\frac{82}{*88} \times 70 = 65.23$	$\frac{**75}{80} \times 30 = 28.13$	93.36
Bidder 3	$\frac{76}{*88} \times 70 = 60.46$	$\frac{**75}{75} \times 30 = 30.0$	90.46
* Represents the highest technical score ** Represents the lowest priced proposal			

**Assumption:** Three responsive (compliant) bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest bid price receive full rated percentage and other proposals are pro-rated accordingly.

The winner is the Bidder scoring the highest Total Points as a result of applying the Best Value Calculations to the technical bid and the bid price respectively. Based on the above calculations a contract would be awarded to Bidder

#### 4. Sole Bid - Price Support

In the event that the Bidder’s proposal is the sole bid received and is deemed responsive, NRCan may request one or more of the following as acceptable price support:

- a) Current published price list indicating the percentage discount available to the federal government; and/or
- b) Paid invoices for like services sold to other customers; and/or
- c) A price certification statement; and/or
- d) Any other supporting documentation as requested.

#### 5. Contract Award Notice/Bidder Proposal Evaluation Debriefing

A Contract Award Notice (CAN) will be prepared and published on the Government Electronic Tendering Service (GETS) hosted by Public Works and Government Services Canada’s website <https://buyandsell.gc.ca/> within seventy-two (72) days after award of any contract. Bidders may request and receive a de-briefing provided that a written request is received by e-mail at [valerie.holmes@NRCan-RNCan.gc.ca](mailto:valerie.holmes@NRCan-RNCan.gc.ca) no later than thirty (30) calendar days from the published date of the CAN.

Bidders are requested to direct any additional questions they may have respecting this competitive bid process to the Contracting Authority detailed herein.

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award



resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca). You can also obtain more information on the OPO services available to you at their website at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca).

## PART 4: RESULTING CONTRACT CLAUSES

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

### 1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid dated \_\_\_\_\_. *(To be completed at contract award)*

### 2. Priority of Documents

If there is a discrepancy between the wording of any document that appears 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 General Conditions - Higher Complexity - Services 2035 (2015-07-03);
- c) Intellectual Property
- d) The supplemental general conditions identified herein;
- e) Annex "A", Statement of Work;
- f) Annex "B", Basis of Payment; *(to be included at contract award)*
- g) The Contractor's bid dated \_\_\_\_\_ *(insert date of bid)*

### 3. Term of Contract

#### 3.1 Period of Contract

The period of the Contract is from date of Contract award to **August 31, 2016**.

#### 3.2 Option to Extend the Contract

The Contractor grants to NRCan the irrevocable option to extend the period of the contract for up to **three (3)** additional **twelve (12)** month periods, under the same terms and conditions and at the prices and/or rates stated in the contract.

The option may only be exercised by the Contracting Authority, at the request of the Project Authority, and will be evidenced, for administrative purposes only, through a contract amendment. NRCan may exercise the option, or any extension thereof, at any time by written notice to the Contractor at least 30 calendar days prior to the contract expiry date.

### 4. Standard Clauses and Conditions

Notwithstanding that they have not been expressly articulated, all clauses and conditions identified in the Contract by number, date and title are applicable and are set out in the [Standard Acquisition Clauses and Conditions Manual](#) issued by Public Works and Government Services Canada.

#### 4.1 General Conditions

**General Conditions - Higher Complexity - Services 2035 (2014-09-25) apply to and form part of the Contract.** As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).



## 4.2 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

## 4.3 Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- where the Foreground consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software

NRCan reserves the right to grant, upon written request, a license to exercise the required Intellectual Property Rights in such Canada-owned information to the successful Contractor.

For reference, the Treasury Board Site is: [http://www.tbs-sct.gc.ca/pubs\\_pol/dcgpubs/contracting/tipaucpca1-eng.asp#\\_Toc490365246](http://www.tbs-sct.gc.ca/pubs_pol/dcgpubs/contracting/tipaucpca1-eng.asp#_Toc490365246)

**SACC Manual clause 4007** - Canada to Own Intellectual Property Rights in Foreground Information (2010-08-16).

## 4.4 Supplemental General Conditions

The following clauses apply to this contract:

### 4.4.1 Dispute Resolution

#### *Mediation*

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

#### *Arbitration*

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

#### *Meaning of "Dispute"*

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

Organizations are encouraged to select from one of the following two options:





**Option 1:**

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

**Option 2:**

Each party hereby:

- a) consents to fully participate in and bear the cost of any dispute resolution process proposed by the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act to resolve a dispute between the parties respecting the interpretation or application of a term or condition this contract; and
- b) agrees that this provision shall, for purposes of section 23 of the Procurement Ombudsman Regulations, constitute such party's agreement to participate in and bear the cost of such process.

The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).

**4.4.2 Withholding Tax of 15 Percent**

The Contractor agrees that, pursuant to the provisions of the Income Tax Act, Canada is empowered to withhold an amount of 15% of the price to be paid to the Contractor, if the Contractor is a non-resident Contractor as defined in said Act. This amount will be held on account with respect to any liability for taxes which may be owed to Canada.

**4.4.3 Foreign Nationals (Canadian Contractor) *(To be completed at contract award)***

SACC Manual clause A2000C (2006-06-16) Foreign Nationals (Canadian Contractor)

**OR**

**4.4.3 Foreign Nationals (Foreign Contractor) *(To be completed at contract award)***

SACC Manual clause A2001C (2006-06-16) Foreign Nationals (Foreign Contractor)

**4.4.4 Values and Ethics Code**

In carrying out the Work under the terms and conditions of this Contract, the Contractor shall adhere to the provisions and practices of the Values and Ethics Code for the Public service (2003), namely, but not restricted to, the provisions pertaining to Respect for Diversity, Human Dignity and People Values. The following link provides the policy reference. [http://www.tbs-sct.gc.ca/pubs\\_pol/hrpubs/tb\\_851/vec-cve-eng.asp](http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tb_851/vec-cve-eng.asp)

**4.4.5 Closure of Government Offices**

Contractor employees are personnel of the Contractor and are paid by the Contractor on the basis of services rendered. Where Contractor's employees are providing services on government premises pursuant to this contract and the said premises become non-accessible due to evacuation or closure of government offices and consequently no work is being performed as a result of the closure, Canada will not be liable for payment to the Contractor for the period of the closure.



## 5. Security Requirement

There is no security requirement associated with this solicitation.

## 6. Authorities

### 6.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Valerie Holmes**  
 Title: Senior Procurement Officer  
 Organization: Natural Resources Canada  
 Address: 615 Booth Street, Ottawa, Ontario, K1A 0E9  
  
 Telephone: (613) 943-3580  
 Facsimile: (613) 947-5477  
 E-mail address: [valerie.holmes@nrcan.gc.ca](mailto:valerie.holmes@nrcan.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.

### 6.2 Project Authority (to be completed at time of contract award)

The Project Authority for the Contract is:

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
  
 Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_\_  
 Facsimile: \_\_\_\_-\_\_\_\_-\_\_\_\_\_  
 E-mail address: \_\_\_\_\_

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. Payment

### 7.1 Basis of Payment

#### Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in the contract for a cost of \$ \_\_\_\_\_ (To be completed at contract award), Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable.



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

**7.2 Method of Payment**

Against invoices (including receipts for travel and living, if applicable) submitted monthly for charges incurred and in accordance with the Basis of Payment and certification by the Project Authority that work performance was satisfactory and acceptable.

Payment by Her Majesty, to the contractor, for the work shall be made within thirty (30) days following the delivery and acceptance of all deliverables specified in the contract or the date of receipt of a duly completed invoice, whichever date is the later.

Payment by Canada for the Work will be made following delivery, inspection and acceptance of the Work, and upon presentation of invoices and any other substantiating documentation as Canada requires.

**7.3 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 Contractor must repay any overpayment, at Canada's request.

**7.4 Firm Per Diem Rate(s) (also known as Daily Rate)**

The Firm Per Diem Rate(s) is based on 7.5 hours (seven hours and 30 minutes) exclusive of meal breaks with no provision for annual leave, statutory holidays and sick leave. For work performed for a duration of more or less than one (1) day, the daily rate will be prorated accordingly to cover actual time worked.

The Per Diem Rate(s) is 'all inclusive' except for travel expenses on project business outside the National Capital Region (that is pre-approved by the NRCan Project Authority), and GST. Charges for expenses which are normally incurred in the provision of services, such as labour for conducting negotiations and providing estimates, resolving contract disputes, tracking time sheets, monthly invoicing, facsimile, copying/printing charges, office supplies, computer hardware and software charges, courier, long distance telephone charges, travel from a personal residence to the NRCan site in the National Capital Region, local travel and the like, must be included in the rates and will not be permitted as additional charges to the contract.

**8. Invoicing Instructions**

Invoices shall be submitted using one of the following methods:

E-mail:

**OR**

Fax:

[Invoicing-Facturation@NRCan-RNCan.gc.ca](mailto:Invoicing-Facturation@NRCan-RNCan.gc.ca)

Local NCR region: **613-947-0987**

Toll-free: **1-877-947-0987**

**Note:**

Attach "PDF" file. No other formats will be accepted

**Note:**

Use highest quality settings available.

Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers:

Contract number: **<provided at time of contract award>**



## 9. Certifications

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## 10. Applicable Laws

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

## 11. Contract Administration

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

## ANNEX "A" - STATEMENT OF WORK

### SW1 Title

Hosting, operation and maintenance of the Equipment Division Contact Data Base (EDCDB)

### SW2 Background

NRCan is responsible for administering the Energy Efficiency Act (EEACT 1992) and Regulations. The Act addresses the energy efficiency of energy-using products and the use of alternative energy sources. Section 5 of the Act is administered by the Equipment Division of the Office of Energy Efficiency, in the Energy Sector of NRCan.

The products prescribed by the Regulations typically must:

- a) Meet minimum energy efficiency performance standards that are outlined in the Regulations;
- b) Bear an energy efficiency verification mark based on data that is third party certified; and
- c) Bear an EnerGuide or lighting package label required (i.e. major household appliances, room air conditioners and light bulbs).

NRCan's compliance strategy includes the promotion of energy-efficient products. Since 2001, NRCan administers and promotes in Canada the use of the international symbol for energy efficiency, ENERGY STAR.

To bear the ENERGY STAR symbol, qualified product models must be registered and meet voluntary premium energy efficiency performance levels. Users and promoters of the symbol must sign on as participants and agree to the conditions of use.

#### 1.1 *Equipment Division Contact Database*

As part of the administration of the Act, the Equipment Division communicates with interested parties about existing regulatory requirements and upcoming changes to the regulations, regulations that have come into effect, and changes in policy and procedures. A significant part of this communication is done through email, and the names and email addresses of interested parties have been held in an Equipment Division Contact Database (EDCDB).

The Equipment Division Contact Database has the following major components:

- a) **Contacts:** The basic information about individuals or organizational positions who have requested that they be informed by NRCan on topics of their interest with respect to the EEAct and ENERGY STAR.
- b) **Participants Agreements:** NRCan has entered into agreements with multiple parties for the purposes of promoting ENERGY STAR in Canada.
- c) **Lookups:** To facilitate the production of meaningful reports based on geography, interest areas and other topics, some fields have been identified as requiring the use of lookup fields.
- d) **Email Campaigns:** NRCan requires the ability to track each email campaign, recording the contents of the email parties that were contacted and the results of the campaign.

### SW3 Objective

NRCan requires the ability to have effective, timely and accurate email communications with contacts who have signed participant agreements, as well as with contacts who have expressed an interest in receiving information about the programs carried out by the Equipment Division.

NRCan is looking for a supplier who would effectively take over the hosting operation and maintenance of the Equipment Division Contact Database (EDCDB).



NRCan would provide an extract from its existing database which would be used to start up the supplier's service, and the supplier would be expected to provide the on-going support and maintenance of the system and its data.

## **SW4 Technical Environment**

### **SW4.1 Current System**

NRCan currently maintains its EDCDB using Filemaker version 10. The system has records for approximately 13,000 organizations and 20,000 Contacts (11,000 do not have an email address).

NRCan's users access the database on their personal computer using a local version of the Filemaker software which accesses a central server over the LAN.

### **SW4.2 Requested Services**

NRCan requires an email list administration service which will take over for the current internal contact database system, and provide NRCan with on-going access to an up-to-date set of email addresses that support its work with the EEACT. The service would allow NRCan to send emails to selected interest areas of the contacts or to groups that are defined by NRCan.

The service would also include the regular process of keeping the addresses current, notifying NRCan when addresses are out of date, and reporting on the email campaigns and the demographics of the contacts.

The system can not include any new software on NRCan workstations or servers and would be accessible in a secure way using the browsers currently installed on NRCan's workstations.

## **SW5 Scope of Work**

### **SW5.1 Description of One Time Services**

#### **A) Setup Registration Website**

The Supplier will establish a secure registration website available to the general public that would be linked from NRCan's site that would allow Contact and corporations to register and maintain their own profile for their interest in the available programs.

The supplier will be responsible for hosting, maintenance and backup of the site.

#### **B) Setup and Intranet Website**

The Supplier will establish a secure Intranet website which would allow authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required.

The Supplier will be responsible for hosting, maintenance and backup of the system.

#### **C) Establish Access Control Lists**

The Access Control Lists (ACL) will be used to determine what privileges will be allocated to the users on the system.

#### **D) Import Existing Data**

The Supplier will import the data from the existing system to use as a starting point for the new service. NRCan will provide information for the following:

- a) Approximately 10,000 contacts



- b) Approximately 2,000 participant agreements
- c) Approximately 500 lookup records

**E) Validate the Initial Content in the Data Import**

An initial email campaign will be carried out to announce the new service to all contacts on the lists, with the return results processed.

**F) Orientation and Documentation**

The Supplier will provide an initial orientation on the system and its use, as well as supporting on-line and hard copy documentation for its use.

**SW5.2 Description of On-Going Services**

**A) Self Service Web Public Website**

The Supplier will establish a secure Internet website which would allow members of the public to sign up for email communications with NRCan, including the ability to select their special areas of interest.

The Supplier will be responsible for hosting, maintenance and back-up of the system.

**B) Intranet Website**

The Supplier will support the secure Intranet website which allows authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required.

The Supplier will be responsible for hosting, maintenance and back-up of the system.

**C) Maintenance of Access Control Lists**

The Access Control Lists (ACL) will be used to determine what privileges will be allocated to the users on the system.

**D) Email List Usage**

The primary purpose of the system is the ability to send emails on demand to a targeted group of interested contacts.

**E) Email List Maintenance for Organizations or Contacts**

The Supplier would be responsible for updates to the content of the database on requests by NRCan.

**F) Notifications of Special Conditions**

The Supplier will create work lists on the Intranet site that alert NRCan to conditions that require action. These work lists will be discussed in the monthly meetings.

**G) Email List Verification**

In an effort to keep the content of the database current, the supplier will initiate an annual verification of the contents of the contact database with each contact in the system.

**H) Areas of Lookup List Maintenance**

In order to allow for the selection of data sets for campaigns to be more consistent, certain fields will be completed from drop down lists (radio button or similar interface elements). These lists will be maintained in the database, and accessible by NRCan for creation or updates.



## I) Business Intelligence

The demographic information contained in both the Contacts and Participant Agreement section of the database will allow for business intelligence reports to help NRCan understand the impact that the programs are having.

## J) Data Export

NRCan requires the ability to export the full data set, as well as subsets of data for additional analysis or processing.

### **SW5.3 Description of Special Services**

NRCan will require special services not expected to exceed one per month for the system which has not been included in the initial setup on On-going operations portions of the SOW. These might include:

- a) NRCan may require special reports which would entail a custom report to be generated;
- b) NRCan may require exports of subsets of the data;
- c) NRCan may require the import of lists of contacts, and this may include duplicate resolution/identification;
- d) On an irregular basis, NRCan may require the replacement of NRCan main contact for a group of contacts.

## **SW6 Technical Details**

### **SW6.1 Contacts**

Fields visible to the Contact.

Includes the following fields (will complete with type of field, default values, allowable ranges, as well as whether it is mandatory or not):

- a) Last Name
- b) First Name
- c) Salutation
- d) Title
- e) Organization Name
- f) Sub-Organization Name
- g) Job Title
- h) Telephone, including extension. Area code will be separate field to allow for data mining
- i) Toll Free Number
- j) Fax Number
- k) Mobile Number
- l) Email Address
- m) Email Comments
- n) Physical Address - province will be mandatory
- o) Interest Areas\* linked to Lookups

Fields restricted to NRCan

- a) Key contact - Boolean
- b) Groups - linked to Lookups
- c) ENERGY STAR login
- d) NRCan contact\* linked to Lookups
- e) Import source\* linked to Lookups
- f) Comments
- g) Groups\* linked to Lookups
- h) Status\* linked to Lookups
- i) Date Created
- j) Date Last Updated





### **SW6.2 Participants Agreements**

Includes the following fields:

- a) Company Name
- b) Former Company Name
- c) Street Address 1
- d) Street Address 2
- e) City
- f) Province\* linked to Lookups
- g) Postal Code
- h) Country\* linked to Lookups
- i) Telephone Number
- j) Toll Free Telephone Number
- k) Fax Number
- l) Website
- m) NRCan Contact 1\* linked to Lookups
- n) NRCan Contact 2\* linked to Lookups
- o) NRCan Contact 3\* linked to Lookups
- p) Parties Involved
- q) Type of Agreement\* linked to Lookups
- r) Type of Group\* linked to Lookups
- s) Type of Sub-Group\* linked to Lookups
- t) Date Started
- u) Date Sent
- v) Date Signed
- w) Date Ended
- x) File Number - unique
- y) Contacts - Multiple Entries:
  - a. Contact 1 Name
  - b. Contact 1 Title
  - c. Contact 1 ID - unique
  - d. Contact 1 - Email address
  - e. Contact 1 - Telephone Number (area code, number, extension)

### **AA) Equipment List - Multiple Entries**

- a) Equipment type\* linked to Lookups
- b) Product\* linked to Lookups
- c) ENERGY STAR\* linked to Lookups
- d) QP\* linked to Lookups
- e) P/AA\* linked to Lookups
- f) Status\* linked to Lookups

### **BB) Geographic Area\* linked to Lookups**

### **CC) Comments**

### **SW6.3 Lookups**

The Supplier will make use of Lookups for select fields to assist in the generation of reports to ensure consistency. The Lookups will include the following fields:

### **DD) Private**

- a) Province (two (2) letter abbreviations, including territories, plus others)



- b) Country (Canada, US, other with a field for other)
- c) Interest areas (Based on products), could be multiple
- d) Language Preference

**EE) Restricted**

- a) Groups (assigned by NRCan) could be multiple
- b) NRCan contact
- c) Contact Status
- d) PA Type of Agreement
- e) PA Type of Group
- f) PA Type of Sub-Group
- g) PA Equipment Agreement Status
- h) PA Geographic Area
- i) PA Equipment List (product interest)

**SW6.4 Email Campaigns**

The Supplier will maintain a summary of all email campaigns that were created.

The email campaigns will include the following fields:

- a) Date
- b) Title
- c) Purpose
- d) Requestor
- e) Body Copy
- f) Selection Criteria for the Contacts
- g) Email Address actually sent to
- h) Results Summary
  - i) Number of emails sent
  - ii) Bounces
  - iii) Opens after one week
  - iv) Clicks after one week

**SW7 Response Time**

For the purpose of this SOW, normal business hours are defined as between 8:00 and 18:00 EDT (EST when time changes), Monday through Friday.

Under special circumstances, the lead-time might be increased where it is judged that the complexity and period of the year would make it impossible (i.e. Christmas period).

**SW8 Reporting and Communications**

**SW8.1 Campaign Activity Reports**

- a) Email campaign summary for each campaign created and emailed to requester and administrator
- b) Available on request after the campaign

**SW7.2 Monthly Activity Reports**

- a) Number of emails campaigns run, with results
- b) Total Contacts, number added, updated, deleted
- c) Total organizations, number added, updated, deleted



- d) Total participant agreements, number added, updated, deleted
- e) Lookups, added and updated
- f) Exports run
- g) The status of exception work lists for bounced emails and unsubscribed addresses that require attention.

### **SW7.3 Annual Activity Reports**

- a) Number of campaigns run, with results
- b) Total Contacts, number added, updated, deleted
- c) Total organizations, number added, updated, deleted
- d) Total participant agreements, number added, updated, deleted
- e) Lookups, added and updated

## **SW9 Description of Risk and Challenges**

### **SW9.1 Overall Challenges**

Overall goals and challenges for the future of the Equipment Database include, but are not limited to:

- a) Privacy
- b) Maintenance
- c) Verification
- d) Flexibility

## **SW10 Location of Work**

All work will be conducted strictly off site. However, the Supplier will provide Toll free phone access

## **SW11 Language of Work**

The Supplier must provide the services in both official languages (English/French).

## **SW12 Commencement and Duration**

The Contract shall start on award date and continue for a period of one (1) year, with the possibility of three (3) optional periods, each for one (1) year.



## ANNEX “B” - TECHNICAL EVALUATION CRITERIA

### B1 Mandatory Technical Criteria

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Bidders are advised to address each criterion in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory criteria may be excluded from further considerations. The technical proposal should address each of the criteria in the order in which they appear.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder’s Proposal
<b>M1: Description of One Time Services: Setup Registration Website:</b>			
<b>M1.1</b>	The Bidder <b>MUST</b> be able to allow contacts and corporations to register and maintain their own profiles for their interest in the available programs <sup>1</sup>  Registered users on the site would be able to see only their own data.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M1.2</b>	The Bidder <b>MUST</b> be able to provide each contact with a unique ID and password, with contact controlled recovery options for passwords. The user passwords will not be accessible to NRCan or the service provider, and will be stored in an encrypted format.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M1.3</b>	The website <b>MUST</b> be NRCan branded and compliant with Treasury Board guidelines: <a href="http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp">http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M1.4</b>	The data stored on the site <b>MUST</b> be protected in a way that is compliant with Treasury Board guidelines: <a href="http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp">http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M2: Setup an Intranet Website:</b>			
The Supplier will establish a secure Intranet website which would allow authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required. The Supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M2.1</b>	The Bidder <b>MUST</b> allow authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M2.2</b>	The Bidder <b>MUST</b> ensure each administrator would require a unique ID and password, with user controlled recovery options for passwords. The administrator passwords will not be accessible to NRCan or the service provided, and will be stored in an encrypted format.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M2.3</b>	The website <b>MUST</b> be NRCan branded and compliant with Treasury Board guidelines:	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<sup>1</sup> The list of programs would be determined by a lookup list selected by NRCan.



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<a href="http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp">http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp</a>		
M2.4	The data stored on the site <b>MUST</b> be protected in a way that is compliant with Treasury Board guidelines: <a href="http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp">http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2.5	The Bidder <b>MUST</b> ensure that the site will provide the contact with the option of working in either official language, with the ability to switch back and forth between them.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2.6	The Bidder <b>MUST</b> ensure that NRCan's administrators with appropriate access control levels would have access to create, update and delete individual records.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2.7	The Bidder <b>MUST</b> ensure that the site includes participant agreement information in the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2.8	The Bidder <b>MUST</b> include lookup list maintenance to allow NRCan to update the content of the lists.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M3: Establish Access Control Lists:</b>			
The Access Control Lists (ACL) will be used to determine what privileges will be allocated to users on the system.			
M3.1	The Bidder <b>MUST</b> be able to allow NRCan's administrators the ability to update any table in the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M3.2	The Bidder <b>MUST</b> be able to allow NRCan to create and maintain users who can access and update data including organizations, contacts, participant agreements and lookups.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M3.3	The Bidder <b>MUST</b> allow NRCan the ability to create and maintain users who can initiate email list usage and review the results of the email campaigns.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M4: Import Existing Data:</b>			
The Supplier will import the data from the existing system to use as a starting point for the new service.			
M4.1	The Bidder <b>MUST</b> be able to successfully import all of the provided data into the new system, including all accented characters in UTF-16	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M5: Validate the Initial Content in the Data Import:</b>			
An initial email campaign will be carried out to announce the new service to all contacts on the list, with the return results processed.			
M5.1	The Bidder <b>MUST</b> provide a site that has a data check for duplicate addresses, and resolution with NRCan of those addresses	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M5.2	The Bidder <b>MUST</b> provide a site that has an initial email campaign to announce the new service that is Canada's anti-spam legislation (CASL) compliant.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M5.3	The Bidder <b>MUST</b> provide application of the special notification and verification process outlined under the on-going services section of the SOW.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M5.4	The Bidder <b>MUST</b> provide resolution of the contacts with the following issues: <ul style="list-style-type: none"> <li>Bounced or invalid email address for any key contact, or contact on a participant agreement</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<ul style="list-style-type: none"> <li>Bounced or invalid email address for other contacts.</li> </ul>		
<b>M6: Orientation and Documentation:</b>			
<b>M6.1</b>	The Bidder <b>MUST</b> provide an orientation session <sup>2</sup> with documentation for NRCan's users on the system for contacts, reporting and exports.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6.2</b>	The Bidder <b>MUST</b> provide an orientation session with documentation for NRCan's administrators on the use of the system including the administrative processes for lookups, reports and exports.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6.3</b>	The Bidder <b>MUST</b> provide an orientation session with documentation for NRCan's administrators on the use of the system including the administrative processes for Participant Agreements, reports and exports.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6.4</b>	The Bidder <b>MUST</b> provide an orientation session with documentation for NRCan's administrators on the use of the systems including the administrative processes for email campaigns, reports and exports.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M7: On-Going Services - Self Service Web Public Website:</b>			
The supplier will establish a secure Internet website which would allow members of the public to sign up for email communications from NRCan, including the ability to select their special areas of interest. The supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M7.1</b>	The Bidder <b>MUST</b> provide continued hosting, maintenance and backup of the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M8: Intranet Website:</b>			
The supplier will support the security Intranet website which allows authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required. The Supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M8.1</b>	The Bidder <b>MUST</b> provide continued hosting, maintenance and backup of the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M9: Maintenance of Access Control Lists:</b>			
The Access Control Lists (ACL) will be used to determine what privileges will be allocated to the users of the system.			
<b>M9.1</b>	The Bidder <b>MUST</b> allow NRCan to create and maintain NRCan users who can access and update data including organizations, contacts, participant agreements and lookups.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M9.2</b>	The Bidder <b>MUST</b> allow NRCan to create and maintain NRCan users who can initiate email list usage and review the results of the email campaigns.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M10: Email List Usage:</b>			
The primary purpose of the system is the ability to send emails on demand to a targeted group of interested contacts.			
<b>M10.1</b>	The Bidder <b>MUST</b> allow NRCan to initiate an email campaign to a selected set of contacts based on one (1) or more of the contact fields, and/or contacts from Participant Agreements based on fields in the PA Table. The campaign should including the following characteristics:	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<sup>2</sup> In both official languages (English/French)



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<ul style="list-style-type: none"> <li>All email campaigns should be compliant with Canada's anti-spam legislation (CASL), including the ability to unsubscribe from the lists.</li> <li>An NRCan user or administrator should be able to initiate and carry out a campaign without any action required from the Supplier.</li> <li>NRCan should be able to create the copy text for the email, which could include embedded HTML (for links or graphics).</li> <li>NRCan should be able to select a set of recipients based on fields from the database (including lookups, interest area, groups, geography, company, etc.)</li> <li>NRCan should be able to run a test email for a campaign to a small set of addresses to verify the campaign.</li> <li>NRCan should be able to schedule a campaign to run at a particular date and time.</li> </ul>		
<b>M10.2</b>	<p>The Bidder <b>MUST</b> allow NRCan to review results of the campaign including:</p> <ul style="list-style-type: none"> <li>The number of emails sent out</li> <li>The number of emails opened</li> <li>The number of emails bounced</li> <li>The number of emails whose links were clicked on</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M11: Email List Maintenance for Organizations or Contacts:</b>			
The Supplier would be responsible for updates to the content of the database based on requests by NRCan.			
<b>M11.1</b>	The Bidder <b>MUST</b> allow NRCan to create new records or update existing records in the contact or participant areas of the database.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M11.2</b>	<p>The Bidder <b>MUST</b> be able to make additions or updates to the content area of the database. These requests could be made by any of the following methods:</p> <ul style="list-style-type: none"> <li>An email request forwarded to the Supplier which includes the information to be added or updated in the database.</li> <li>NRCan could forward a vCard file for import</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M11.3</b>	<p>The Bidder <b>MUST</b> respond to campaign results for bounced addresses with a process to notify NRCan and resolve the items.</p> <ul style="list-style-type: none"> <li>A work list should be available to NRCan for all key contacts<sup>3</sup> whose email address bounces.</li> <li>A work list should be available to NRCan for all non-key contacts whose email address bounces.</li> <li>A work list should be available to NRCan for all key contacts who have unsubscribed from the lists. After contacting the subscriber, a process should exist to reinstate the contact, if appropriate.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<sup>3</sup> Key Contacts are based on a field in the Contacts table, or for contacts that re listed in the participant's agreements



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
<b>M12: Notifications of Special Conditions:</b>			
The Supplier will create work lists on the Intranet site that alert NRCan to conditions that require action. These work lists will be discussed in the monthly meetings.			
<b>M12.1</b>	The Bidder <b>MUST</b> be able to identify the following: <ul style="list-style-type: none"> <li>• missing key contact for participant agreements;</li> <li>• no email address for key contacts;</li> <li>• no name for key contacts;</li> <li>• bounces or unsubscribes for key contacts;</li> <li>• Missing NRCan contact (from either data entry issues, or personnel changes where an NRCan employee is no longer on the list of NRCan contacts);</li> <li>• Duplicate entries with the same email address;</li> <li>• Organizational names that are similar, at the same or similar address;</li> <li>• The work lists can be exported in tab delimited format.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M13: Email List Verification:</b>			
In an effort to keep the content of the database current, the Supplier will initiate an annual verification of the contents of the contact database with each contact in the system.			
<b>M13.1</b>	The Bidder <b>MUST</b> work with NRCan to develop an email campaign to request that contacts verify their own information.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M13.2</b>	The Bidder <b>MUST</b> email all current subscribers with their current information, and a link providing them the option to update their information.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M13.3</b>	The Bidder <b>MUST</b> provide an option for special campaigns to run for renewals in specific topic areas based on upcoming events or changes to regulations or standards.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M14: Areas of Lookup List Maintenance:</b>			
In order to allow for the selection of data sets for campaigns to be more consistent, certain fields will be completed from drop-down lists (radio buttons or similar interface elements). These lists will be maintained in the database, and accessible by NRCan for creation or updates.			
<b>M14.1</b>	The Bidder <b>MUST</b> allow NRCan to update the content of all the lookup lists used on the Internet and Intranet websites.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M15: Business Intelligence:</b>			
The demographic information contained in both the Contacts and Participant Agreement section of the database will allow for business intelligence reports to help NRCan understand the impact that the programs are having.			
<b>M15.1</b>	The Bidder <b>MUST</b> be able to provide the following: <ul style="list-style-type: none"> <li>• Reports for email campaigns (as mentioned above);</li> <li>• Reports of the contacts, with a selection allowed by any of the lookup fields;</li> <li>• Reports of the organization, with a selection allowed by any of the lookup fields;</li> <li>• Reports of the Participant Agreements, with a selection allowed by any of the lookup fields.</li> <li>• Various demographic reports on the organizations</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	





Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	and Contacts in the system including: <ul style="list-style-type: none"> <li>Count of current organizations/contacts by province;</li> <li>Count of current organizations/contacts by product interest area by province;</li> <li>Count of current organizations/contacts of "signed up" by year;</li> <li>Trends.</li> </ul>		
<b>M16: Data Exports:</b>			
NRCan requires the ability to export the full data set, as well as subsets of data for additional analysis or processing.			
<b>M16.1</b>	The Bidder <b>MUST</b> be able to conduct a wide variety of tasks that may including but not limited to the following: <ul style="list-style-type: none"> <li>The Intranet site will provide the option for administrators to export the full set of data on demand;</li> <li>The Intranet site will provide the option for administrators to export a subset of data on demand. The data export could be for the following conditions:               <ul style="list-style-type: none"> <li>Only include exports that will be used regularly, the rest could be requested as special, then included in the menus, if needed</li> </ul> </li> <li>Include all fields, or only selected fields;</li> <li>Exports in tab delimited format.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

## B2 Point Rated Technical Criteria

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all of the mandatory criteria. Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan's assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from bidders.

Proposals must achieve the stated minimum points required for each rated criterion to be assessed as responsive under the point rated technical criteria section; proposals not meeting the minimum required points will be deemed non-responsive.

Only those proposals which are responsive (compliant) with all of the mandatory criteria and then achieve (or exceed) the stated minimum points OR percentage required for the point rated technical criteria section will be further considered for award of a contract. Proposals not meeting the minimum points OR percentage required will be deemed non-responsive.

### Point Rated Requirements:

Item	Requirement	Points Breakdown	Max Points	Illustrated Compliance
<b>R1: Description of One Time Services: Setup Registration Website:</b>				
<b>R1.1</b>	The Bidder's site will provide the contact with the option of working in either official language, with the ability to switch back and forth between them.	Yes 10 No 0	<b>10</b>	



<b>Point Rated Requirements:</b>				
<b>Item</b>	<b>Requirement</b>	<b>Points Breakdown</b>	<b>Max Points</b>	<b>Illustrated Compliance</b>
<b>R1.2</b>	The Bidder has provided details on the implementation of similar solutions	1 - 2 projects 10 3 - 4 projects 20 ≥5 projects 30	<b>30</b>	
<b>R1.3</b>	The Bidder has an implementation plan including security and privacy approach on how the Bidder will implement the system.	Excellent 30 Good 20 Fair 10 Poor 0	<b>30</b>	
<b>R1.4</b>	The Bidder has the ability to allow the import of a vCard to seed the entries	Yes 5 No 0	<b>5</b>	
<b>R1.5</b>	The Bidder has CATCHA or a similar system to reduce the likelihood of registration by netbots. Proof to be provided	1 - 2 projects 10 3 - 4 projects 20 ≥5 projects 30	<b>30</b>	
<b>R1.6</b>	The Bidder has put in place processes to identify and handle duplicate registration.	Yes 5 No 0	<b>5</b>	
<b>R1.7</b>	The Bidder will provide a service level agreement	<b>10 points:</b> SLA complete <b>5 points:</b> SLA missing key factors <b>0 points:</b> SLA not acceptable	<b>10</b>	
<b>Total Points Available for R1:</b>			<b>120</b>	
<b>Total Points Needed to be Considered Compliant (60%)</b>			<b>72</b>	
<b>R2: Setup an Intranet Website:</b>				
<b>R2.1</b>	The Bidder has provided details on the implementation of similar solutions	1 - 2 projects 10 3 - 4 projects 20 ≥5 projects 30	<b>30</b>	
<b>R2.2</b>	The Bidder has an implementation plan including security and privacy approach on how the Bidder will implement the system.	Excellent 30 Good 20 Fair 10 Poor 0	<b>30</b>	
<b>R2.3</b>	The Bidder has the ability to allow the import of a vCard to seed the entries	Yes 5 No 0	<b>5</b>	
<b>R2.4</b>	The Bidder has the ability to provide a provision for two (2) factor authentication for administrator access to the system.	Yes 5 No 0	<b>5</b>	
<b>R2.5</b>	The Bidder will provide a service level agreement	<b>10 points:</b> SLA complete <b>5 points:</b> SLA missing key factors <b>0 points:</b> SLA not acceptable	<b>10</b>	
<b>Total Points Available for R2:</b>			<b>80</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R2:</b>			<b>48</b>	
<b>R3: Import Existing Data:</b>				
<b>R3.1</b>	The Bidder has an implementation plan including security and privacy approach on how the Bidder will implement the system.	Excellent 30 Good 20 Fair 10 Poor 0	<b>30</b>	
<b>Total Points Available for R3:</b>			<b>30</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R3:</b>			<b>18</b>	
<b>R4: Validate the Initial Content in the Data Import</b>				



Point Rated Requirements:				
Item	Requirement	Points Breakdown	Max Points	Illustrated Compliance
R4.1	The Bidder has an implementation plan for the import process	Excellent 30 Good 20 Fair 10 Poor 0	30	
<b>Total Points Available for R4:</b>			<b>30</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R4:</b>			<b>18</b>	
<b>R5: Orientation and Documentation</b>				
R5.1	The Bidder has an implementation plan for orientation and documentation.	Excellent 30 Good 20 Fair 10 Poor 0	30	
R5.2	The Bidder has an on screen help in both official languages (English/French) for all fields.  If possible, the Bidder is to provide a screen shot showing both languages	Yes 10 No 0	10	
<b>Total Points Available for R5:</b>			<b>40</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R5:</b>			<b>24</b>	
<b>R6: Email List Usage:</b>				
R6.1	The Bidder has the ability to duplicate the content of a previous campaign as the starting point for a new campaign.	Yes 5 No 0	5	
<b>Total Points Available for R6:</b>			<b>5</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R6:</b>			<b>3</b>	
<b>R7: Business Intelligence</b>				
R7.1	The Bidders systems should be able to provide graphic representation of reports. (Max 30 points)  Note to Bidders: If your current system is able to provide the above, please provide a screen shot.	<b>Graphic representation of report (20 points maximum):</b> <b>20 points:</b> Bidder's system currently provides chart (bar, pie, trend lines) <b>10 points:</b> Bidder's system can be programmed to provide this detail <b>5 points:</b> Bidder's system can be shown graphically in tubular format <b>0 points:</b> Bidder's system cannot provide this detail	20	
R7.2	The Bidders systems should be able to provide an accumulation of trend data for all the mandatory reports (reports for each campaign would normally be presented individually (i.e. total number	<b>Trend Data (total 20 points max):</b> <b>20 points:</b> Bidder's system currently provides	20	



Point Rated Requirements:					
Item	Requirement	Points Breakdown	Max Points	Illustrated Compliance	
	of emails sent, total opened, total click through, total bounces) (Max 25 points)  Note to Bidders: If your current system is able to provide the above, please provide a screen shot.	reports that would span multiple campaigns in order to understand the trend for that style campaign over the past usages <b>10 points:</b> Bidder's system can be programmed to provide this detail <b>0 points:</b> Bidder's system cannot provide this detail			
<b>R7.3</b>	The Bidders systems should be able to provide exports of data from reports (the reports would be provided on screen) (Max 25 points)  Note to Bidders: If your current system is able to provide the above, please provide a screen shot.	<b>Exports of Data for Reports (30 points):</b> <b>30 points:</b> Bidder's system can currently export reports (in tab delimited and/or Excel formats) to allow for data to be analyzed in more detail <b>15 points:</b> Bidder's system can be programmed to provide this detail <b>0 points:</b> Bidder's system cannot provide this detail	<b>30</b>		
<b>Total Points Available for R7:</b>			<b>70</b>		
<b>Total Points Needed to be Considered Compliant (60%) for R7:</b>			<b>42</b>		
<b>R8: Data Export:</b>					
<b>R8.1</b>	The Bidder can confirm that all data exports from the system will be logged and reported as part of regular reporting.	Yes 5 No 0	<b>5</b>		
<b>R8.2</b>	The Bidder can export into an XML format.	All Reports 5 No Reports 0	<b>5</b>		
<b>R8.3</b>	The Bidder has an option for vCard for one, some or all contacts.	All 5 Some 3 One 0	<b>5</b>		
<b>Total Points Available for R8:</b>			<b>15</b>		
<b>Total Points Needed to be Considered Compliant (60%) for R8:</b>			<b>9</b>		
<b>Total Points Available:</b>			<b>390</b>		
<b>Total Points Needed to be Considered Compliant (60%):</b>			<b>234</b>		



## ANNEX "C" - FINANCIAL PROPOSAL

### C1 Taxes as Related to Bids Received

For Canadian-based bidders, prices/rates, as applicable, are requested to be firm (in Canadian funds) with Canadian customs duties and excise taxes as applicable **included**, and Goods and Services Tax (GST) or Harmonized Sales Tax (HST) as applicable, **excluded**;

For foreign-based bidders, prices/rates, as applicable, are requested to be firm (in Canadian funds) and **exclude** Canadian customs duties, excise taxes and GST or HST, as applicable. Canadian customs duties and excise taxes payable by the consignee will be added, for evaluation purposes only, to the prices submitted by foreign-based bidders. If the prices submitted in the financial proposal are not in Canadian Funds the exchange rate in effect on the date of bid closing will be applied for evaluation purposes only.

### C2 Pricing Details to be Provided in Financial Proposal

The Bidder hereby offers to NRCan, as requested by the Minister, to furnish all necessary expertise, supervision, materials, equipment and other items necessary to performing the work as described in the statement of work of this Request for Proposal and in accordance with the terms and conditions of the Request for Proposal, to the satisfaction of the Minister, or his or her authorized representative, for the following price(s).

Bidders must provide financial details as requested in this Annex. Proposals which do not contain pricing details as requested below shall be considered incomplete and non-responsive.

#### C3.1 Professional Fees:

Requirement	Rates	Cost
Implementation Cost Includes import/export of data	\$	\$
Maintenance for 12 months	\$	\$
<b>Total Cost for Initial Period:</b>		<b>\$</b>

#### Option Period #1:

Requirement	Number of Months	Monthly Cost	Total Cost for Option #1
Maintenance and Support of the System	12 months	\$	\$

#### Option Period #2:

Requirement	Number of Months	Monthly Cost	Total Cost for Option #1
Maintenance and Support of the System	12 months	\$	\$

#### Option Period #3:

Requirement	Number of Months	Monthly Cost	Total Cost for Option #1
Maintenance and Support of the System	12 months	\$	\$

#### C3.4 Bidder Total Tendered Price

Bidder total tendered price to perform the work for the initial period (date of award to June 30, 2016)	\$
Bidder total tendered price for optional periods (Option 1, 2, and 3)	\$
Bidder total tendered price inclusive of optional periods	\$



Any estimated level of effort specified in the Pricing Details detailed above is provided for financial proposal evaluation purposes only. It is only an approximation of the requirements and is not to be considered as a contract guarantee. Travel, material and number of days (or level of effort) are provided as estimates only, and must not be construed as a commitment by NRCan to respect those estimated in any resulting contract.

**Firm Per Diem Rate(s) (also known as daily rate)** - The Firm Per Diem Rate(s) is based on 7.5 hours (seven hours and 30 minutes) exclusive of meal breaks with no provision for annual leave, statutory holidays and sick leave. For work performed for a duration of more or less than one (1) day, the daily rate will be prorated accordingly to cover actual time worked.

The Per Diem Rate(s) is 'all inclusive' except for travel expenses on project business outside the National Capital Region (that is pre-approved by the NRCan Project Authority), and GST. Charges for expenses which are normally incurred in the provision of services, such as labour for conducting negotiations and providing estimates, resolving contract disputes, tracking time sheets, monthly invoicing, facsimile, copying/printing charges, office supplies, computer hardware and software charges, courier, long distance telephone charges, travel from a personal residence to the NRCan site in the National Capital Region, local travel and the like, must be included in the rates and will not be permitted as additional charges to the contract.



## ANNEX “D” - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### Certifications Precedent to Bid Closing

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. Federal Contractors Program - Certification

#### Federal Contractors Program for Employment Equity - over \$25,000 and below \$200,000

Suppliers who are subject to the Federal Contractors Program (FCP) and have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive federal government contracts over the threshold for solicitation of bids as set out in the *Government Contracts Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than 100 employees. Any bids from ineligible contractors, including a bid from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- (a) ( ) is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- (b) ( ) is not subject to the FCP, being a regulated employer under the [Employment Equity Act](#), S.C. 1995, c. 44;
- (c) ( ) is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC, having not bid on requirements of \$200,000 or more;
- (d) ( ) has not been declared an ineligible contractor by HRSDC, and has a valid certificate number as follows: \_\_\_\_\_.

Further information on the [FCP](#) is available on the HRSDC Web site.



Signature of Authorized Company Official

Date

2. Former Public Servant Certification

Contracts with 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 spending public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.

Definitions

For the purposes of this clause,

"Former public servant" means a 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 and includes:

- (a) An individual;
(b) An individual who has incorporated;
(c) A partnership made up of former public servants; or
(d) 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 Public Service.

"pension" means, in the context of the fee abatement formula, 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 (FPS) in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? YES ( ) NO ( )

If so, the Bidder must provide the following information:

- (a) Name of former public servant;
(b) Date of termination of employment or retirement from the Public Service.

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? 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: \_\_\_\_\_  
 Number of weeks: \_\_\_\_\_
- (g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

Contract Number:  
 \_\_\_\_\_  
 \_\_\_\_\_

Contract Value:  
 \_\_\_\_\_  
 \_\_\_\_\_

**Certification**

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

**3. Status and Availability of Resources**

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

\_\_\_\_\_  
 Signature of Authorized Company Official

\_\_\_\_\_  
 Date

**4. Education and Experience**

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

\_\_\_\_\_  
 Signature of Authorized Company Official

\_\_\_\_\_  
 Date



## 5. Contractual Capacity and Joint Venture Contractual Capacity

The Bidder shall have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business.

Joint Venture - a joint venture is an association of two or more parties who temporarily combine their money, property, knowledge, or other resources in a joint business enterprise. There are two types of joint ventures, the incorporated joint venture and the contractual joint venture, i.e., formed through a contractual agreement between the parties. The following information should be provided with the proposal: type of joint venture (incorporated or contractual), the names and addresses of the members of the joint venture.

If a Contract is awarded to a contractual joint venture all members of the joint venture shall be jointly and severally or solidarily liable for the performance of the contract.

## 6. Aboriginal Designation

An Aboriginal business, which can be:

- i. a band as defined by the Indian Act
- ii. a sole proprietorship
- iii. a limited company
- iv. a co-operative
- v. a partnership
- vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

This is to confirm:

- Our Company is an Aboriginal Firm, as identified above
- Our Company is NOT an Aboriginal Firm

### Certification

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

\_\_\_\_\_  
Signature of Authorized Company Official

\_\_\_\_\_  
Date