Public Works and Government Services Canada / Travaux publics et Services gouvernementaux Canada

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des soumissions - TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

Proposal To: Public Works and Government Services Canada

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

Proposition aux: Travaux Publics et Services Gouvernementaux Canada

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

Comments - Commentaires

Title - Sujet
Strategic Communication

Solicitation No. - N° de l'invitation
46558-166414/A

Date
2015-11-20

Client Reference No. - N° de référence du client
46558-16-6414

GETS Reference No. - N° de référence de SEAG

File No. - N° de dossier
cx024.46558-166414

CCC No./N° CCC - FMS No./N° VME

Solicitation Closes - L'invitation prend fin
at - à 02:00 PM
on - le 2015-12-07

Time Zone
Fuseau horaire
Eastern Standard Time EST

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

Address Enquiries to: - Adresser toutes questions à:
Gordon, Emily

Buyer Id - Id de l'acheteur
cx024

Telephone No. - N° de téléphone
(613) 990-3814 ( )

FAX No. - N° de FAX
(613) 993-2581

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:
CANADA REVENUE AGENCY
6TH FL.
555 MACKENZIE AVE
OTTAWA
Ontario
K1A0L5
Canada

Instructions: See Herein

Instructions: Voir aux présentes

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

Delivery Required - Livraison exigée
See Herein

Delivery Offered - Livraison proposée

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

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

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature **Date**

Issuing Office - Bureau de distribution
Communication Procurement Directorate/Direction de l'approvisionnement en communication
360 Albert St. / 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

Canada

Item Article	Description	Dest. Code Dest.	Inv. Code Fact.	Qty Qté	U. of I. U. de D.	Unit Price/Prix unitaire FOB/FAM Destination	Unit Price/Prix unitaire FOB/FAM Plant/Usine	Delivery Req. Livraison Req.	Del. Offered Liv. offerte
1	Strategic Communication	46558	46558	1	Each	$	$	See Herein	

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Evaluation Grid, the Task Authorization Form 572, the Insurance Requirements, and any other annexes.

1.2 Summary

The Canada Revenue Agency requires the services of a Contractor to develop a social media engagement strategy, implementation plan and evaluation framework and methodology. The period of the contract will be from date of Contract award to March 31, 2016, with three (3) one-year option periods.

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

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.
Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

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

2.2 Submission of Bids

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

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

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

a. an individual;

b. an individual who has incorporated;

c. a partnership made of former public servants; or

d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement*

Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act* , 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S. 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

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

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

a. name of former public servant;

b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

a. name of former public servant;

b. conditions of the lump sum payment incentive;

c. date of termination of employment;

d. amount of lump sum payment;

e. rate of pay on which lump sum payment is based;

f. period of lump sum payment including start date, end date and number of weeks;

g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.4 Enquiries - Bid Solicitation

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

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

2.5 Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.6 Basis for Canada's Ownership of Intellectual Property

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract(s) will belong to Canada, on the following grounds: where the material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid (4 hard copies and 1 electronic copy on USB key)

Section II: Financial Bid (2 hard copies and 1 electronic copy on USB key)

Section III: Certifications (1 hard copy)

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

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

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

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

1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and

2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Bid

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

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

Section II: Financial Bid

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

Section III: Certifications
Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Bidders must meet all the mandatory requirements of the RFP. No further consideration will be given to Bidders not meeting all the mandatory criteria.

To meet the requirement described herein, the experience of the Bidder must be work for which the Bidder was under contract to external clients. During the evaluation no corporate experience gained through internal clients will be accepted or reviewed. In the case of a joint venture, the combined experience of the parties forming the joint venture will be considered in the evaluation of the experience of the Bidder.

Listing experience without providing any supporting data to describe where and how such experience was obtained will result in the experience not being included for evaluation purposes.

Definitions for the purposes of evaluation:

"External client(s)" means clients exterior to the Bidder's own legal entity (or joint venture partnership) and excludes the parent, subsidiaries or other affiliates of the Bidder.

"Internal client(s)" means clients within the Bidder's own legal entity (or joint venture partnership) and includes the parent, subsidiaries and other affiliates of the Bidder.

"Relevant experience" means demonstrated experience to meet the minimum qualifications specified for each of the key personnel.

M.1. Key Personnel Identification (Curriculum Vitae (CV))

The Bidder must clearly identify the proposed key personnel for the following roles:

- Account Manager
  Minimum Required Qualifications:
  - Three (3) years' experience in Account Management and a post-secondary degree or diploma in a related field; or
  - Five (5) years' experience in Account Management.

- Digital Engagement Strategist
  Minimum Required Qualifications:
  - Two (2) years' experience in developing Digital Engagement and Interactive Strategy as well as post-secondary degree or diploma in marketing, digital/internet, computer science or a related field; or
  - Four (4) years' experience in developing Digital Engagement and Interactive Strategy

- Creative Director
  Minimum Required Qualifications:

- Three (3) years' experience in Creative Direction for social media, and a post-secondary degree or diploma in a related field; or
- Five (5) years' experience in Creative Direction

- Senior Analyst
  Minimum Required Qualifications:
- Three (3) years' experience in analytics for social media, and a post-secondary degree or diploma in a related field; or
- Five (5) years' experience in analytics for social media

Each of the key personnel must meet the minimum required qualifications, as specified for each of the identified roles. The Bidder may propose the same individual for more than one (1) role, provided that the individual meets the minimum required qualification for each role.

The period of time that the proposed key personnel worked in each identified place of employment will be added to determine the number of years' experience for evaluation purposes.

The Bidder must provide résumés for all identified key personnel proposed to provide the services as described in the Statement of Work at Annex "A". The following information must be included: their education/training, their work history and their relevant experience (including dates).

M.2. Experience of the Firm

M 2.1 The Bidder must demonstrate that it has been contractually bound to an external client or to external clients (outside of the Bidder's own company) for two (2) on-going or completed projects to provide digital social media engagement services as described in the Annex A Statement of Work (SOW).

The two (2) on-going or completed projects must have been completed on or after January 1, 2012, or initiated before February 1, 2015.

One (1) project must include or have included deliverables developed in English and one (1) project must have must have included deliverables developed in French or bilingually (in English and in French).

If a bilingual project is submitted, the Bidder cannot submit the French and English versions of the deliverables for the same project as their two (2) project samples for evaluation.

A minimum of one (1) of the two (2) projects must include the launch of a social media platform.

During the evaluation no corporate experience gained through internal clients will be accepted or reviewed.

Each of the two (2) projects must include or have included all of the following services:

- Developing strategies for social media engagement that include:
  - Reviewing and analyzing the current social media landscape to inform development of the social media strategy including analysis of multiple target audiences and latest social media trends.
  - Analyzing and recommending digital engagement and interactive tactics to engage target audiences;
  - Developing social media content
- Developing and implementing a social media engagement campaign

- Developing an evaluation framework to assess the effectiveness of the social media engagement efforts.

M 2.2 The Bidder must provide a case study description of each of the two (2) project samples. The Bidder must include all the following information for each of the two (2) project case studies submitted:

- Title and summary description of the project;
- A description of the target audience;
- Description of the services provided or to be provided for the project;
- Overall creative approach to meet client objectives;
- List of deliverables of the project;
- Completion date or initiation date;
- Client information;

The two (2) case studies will be evaluated in the R.2 point rated technical evaluation criterion.

M 2.3 For each of the two (2) projects, the Bidder must provide an electronic copy of two (2) deliverables completed and delivered to the Client as part of the project. The Bidder must provide the samples of the deliverables on USB. The deliverable must be a creative asset (written, graphic or a combination of both) produced for deployment on a social media channel.

The two (2) deliverables for each of the two (2) projects (a total of four [4]) deliverables) will be evaluated in the R.3 point rated technical evaluation criterion.

M.3. Financial Proposal

The Bidder must provide costing information strictly in accordance with the Basis of Payment at Annex B. Any deviation from the pricing schedule will render your offer non-responsive.

FAILURE TO PROVIDE DETAILED INFORMATION FOR ANY OF THE ABOVE MAY RESULT IN THE PROPOSAL BEING DEEMED NON-RESPONSIVE. BIDS NOT MEETING THE ALL THE MANDATORY REQUIREMENTS WILL BE GIVEN NO FURTHER CONSIDERATION.

4.1.1.2 Point Rated Technical Criteria

Only those proposals which first meet the Mandatory Requirements will be considered in the second stage of the evaluation, the Technical Evaluation.

To be considered compliant, bidders must obtain a minimum passing mark of 80% for each of the point rated criteria and each of the sub-criteria (R.1.1, R.1.2, R.2, and R.3) of the point rated technical evaluation criteria. The rating is performed on a scale of **100 points**. Proposals scoring less than 80% for each of the point rated criteria and each of the sub-criteria (R.1.1, R.1.2, R.2, and R.3) of the point rated technical evaluation criteria will not be given further consideration.

Bidders are instructed to address each requirement in sufficient depth to permit a complete analysis and assessment by the Evaluation Team.

Proposals will be evaluated on the completeness and level of detail by which they address the rated requirements. For example, if a description of a process or procedure is requested, the various steps which the Bidder will perform in order to complete the requirement, as detailed in the Annex A Statement of Work (SOW), should be described.

General statements should be avoided. These do not provide details which can be compared to the description of the requirement and therefore evaluated as to their relevancy in fulfilling the requirement, as detailed in the SOW.

Assessment of proposals will be based solely on the information in the Proposal. Canada may seek further information or clarification from the bidder.

The points allocated for selected criteria will be multiplied by the specified weighting factor (w.f.).

R.1. APPROACH AND METHODOLOGY

R.1.1 Understanding of the Requirement (Maximum of 30 points – Minimum of 24 points)

The Bidder should describe the methodology that it will use to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms, and the social media behaviour of the target audiences identified in the Annex A Statement of Work. The Bidder should also provide details to describe the most effective methods to communicate with the target audiences. The description should outline any challenges in meeting Canada Revenue Agency’s overall digital engagement objectives for the target audiences and the Bidder’s proposed solutions.

There are nine (9) distinct target audiences:

- Youth
- Seniors
- Aboriginal peoples
- New Canadians
- Persons with disabilities
- Charities
- Small and medium sized enterprises
- Tax preparers
- Potential employees.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements are described or are poorly described · Not enough details are provided to assess how the Bidder’s approach and methodology will be used to meet to the requirements as described in Annex A - Statement of Work. OR Not enough details are provided to assess how the Bidder’s approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. OR Details do not provide evaluators with an understanding of the social media behavior of the target audience and/or how to effectively communicate with it. OR The description does not outline any challenges in meeting the digital engagement objectives or does not provide any solutions.
0.8	Good	· Most elements present · Most elements are well described

		· Details provide evaluators with an understanding of the social media behavior of the target audience and how to effectively communicate with it. · Details provided to describe how the Bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. · The description provides details to outline the challenges in meeting the digital engagement objectives with some solutions.
0.9	Very Good	· All elements present · Most elements are well described · Substantial details provide evaluators with an understanding of the social media behavior of the target audience and how to effectively communicate with it. · Details provided to describe how the Bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. The description provides details to outline the challenges in the digital engagement objectives with solutions.
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the social media behavior of the target audience and how to effectively communicate with it. · Substantial details provide evaluators with a clear understanding of how the bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. · The description provides clear details to outline the challenges in meeting the digital engagement objectives with well thought-out solutions.
		Points Allocated for R1.1:_____/ 30

R.1.2 Project Management Approach (Maximum of 30 points – Minimum of 24 points)

The Bidder should propose a preliminary project management approach that provides flexibility and considers client needs as described in this RFP. It should reflect how the Bidder proposes to work in collaboration with the Project Manager and Project Team and outline the key areas that require input from the Client. It should illustrate how the Bidder will ensure that performance, quality, and scheduled goals are achieved.

The Bidder should provide a detailed description of the proposed project management approach and procedures, schedule controls, risk mitigation, as well as the tools and techniques that will be used to plan, organize, direct and control the Project. The project management approach should also outline how the Bidder proposes to work in collaboration with the Project Authority to insure sufficient time for review and Government approval process.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements are described or are poorly described · Does not provide details to assess how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. OR Does not provide details to describe the tools and techniques that will be used to plan, organize, direct, and control the project. OR · Does not identify any interaction between the Bidder and the Project Authority.
0.8	Good	· Most elements present · Most elements are well described · Details provided lead to a good understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project. · Details lead to an understanding of the interaction between the Bidder and the Project Authority.
0.9	Very Good	· All elements present · Most elements are well described · Substantial details lead to a good understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project. · Substantial details lead to a good understanding of the interaction between the Bidder and the Project Authority.
1	Excellent	· All elements present · All elements are well described · Substantial details lead to a complete and thorough understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Clear details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project. Substantial details lead to a complete and thorough understanding of the interaction between the Bidder and the project Authority and how the Bidder proposes to work in collaboration with the Project Authority to ensure sufficient time for government of Canada approval processes.
		Points Allocated for R1.2:_____/30

Total points allocated for the Rated Criteria R.1: ________ / 60 points

R.2 Case Studies (Maximum of 40 points – Minimum 32 points)

A maximum of 20 points will be allocated for each Case Study

For each of the two (2) Case Studies submitted for M.2 the Bidder should provide the following information:

- The timeframes for the social listening period and implementation period;
- How the social media landscape review was undertaken (e.g., general methodology used, methodology used for various audiences);
- Review of latest social media trends and how these trends could affected the approach to the stated target audiences;
- The overall digital engagement strategy and interactive engagement tactics;
- How key insights from the review of the social media landscape were used to target particular audiences;
- The evaluation framework and why it was recommended to assess the effectiveness of the social media engagement efforts;
- The results of the social media engagement efforts to date, referencing measurable objectives and how they were met.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements presented are described or are poorly described OR Details do not provide evaluators with an understanding of the objectives of the project as described in the case study. OR Details do not provide evaluators with an understanding of how the project objectives, as described in the case study, were met. OR · The case study does not demonstrate appropriateness for the stated target audience
0.8	Good	· Most elements present · Most elements are well described · Details provide evaluators with an understanding of the objectives of the project, and how the client objectives, as described in the case study, were met. · The case study demonstrates appropriateness for the stated target audience
0.9	Very Good	· All elements present · Most elements are well described · Details provide evaluators with a good understanding of the objectives of the project, and how the client objectives, as described in the case study, were met · The case study demonstrates appropriateness for the stated target audience
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the objectives of the project, and how the client objectives, as described in the case study were met

		· The case study demonstrates appropriateness for the stated target audience
Points Allocated for R.2 – Case Study 1:_____/20		
Points Allocated for R.2 – Case Study 2:_____/20		

Total points allocated for the Rated Criteria R.2: ________ / 40 points

R.3 Project Deliverables (Maximum of 40 points – Minimum 32 points)
A maximum of 10 points will be allocated for each Sample of the Project Deliverables

For each of the two (2) deliverables provided for each of the two (2) projects submitted for M.2 the Bidder should provide the following information:

- A brief description of the deliverable
- The final format of the deliverable produced for the project
- The objective of the deliverable
- How the deliverable was used to meet the project objectives

The deliverable must be a creative asset (written, graphic or a combination of both) produced for deployment on a social media channel.

For evaluation of deliverables: provide two (2) digital samples of final versions of the materials, (on CD, DVD or flash drive) formatted for viewing in Microsoft Windows to include:

- Image Files - .pdf file type;
- Video Files - QuickTime for Windows - .mov file type - .avi file type / H.264 compression / 4:3 NTSC (i.e. 640x480) or 16:9 NTSC (i.e. 720x480) / 8Mbps / 16 bit, stereo, 48khz;
- Audio Files -mp3, stereo, 128kbps.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements presented are described or are poorly described OR Details do not provide evaluators with an understanding of the objectives of the deliverable. OR Details do not provide evaluators with an understanding of how the deliverable was used to meet the project objectives OR · The Sample of the deliverable does not demonstrate appropriateness for the stated target audience
0.8	Good	· Most elements present · Most elements are well described · Details provide evaluators with an understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives. · The Sample of the deliverable demonstrates appropriateness for the stated target audience
0.9	Very Good	· All elements present · Most elements are well described

		· Details provide evaluators with a good understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives. · The Sample of the deliverable demonstrates appropriateness for the stated target audience
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives. · The Sample of the deliverable demonstrates appropriateness for the stated target audience
Points Allocated for R.2 – Project 1 – Sample of deliverable 1:_____/10		
Points Allocated for R.2 – Project 1 – Sample of deliverable 2:_____/10		
Points Allocated for R.2 – Project 2 – Sample of deliverable 1:_____/10		
Points Allocated for R.2 – Project 2 – Sample of deliverable 2:_____/10		

Total points allocated for the Rated Criteria R.3: ________ / 40 points

4.1.2 Financial Evaluation

4.1.2.1 Mandatory Financial Criteria

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

The Bidder must identify prices and rates in accordance with the Basis of Payment at Annex “B”.

A Bid Evaluation Value (BEV) will be calculated for evaluation purposes only in accordance with Annex “B” Basis of Payment.

4.2 Basis of Selection

4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:

    a. comply with all the requirements of the bid solicitation; and

    b. meet all mandatory criteria; and
    c. obtain the required minimum of 112 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 140 points.

2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.

3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.

4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is $45,000 (45).

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		$55,000.00	$50,000.00	$45,000.00
Calculations	Technical Merit Score	115/135 x 60 = 51.11	89/135 x 60 = 39.56	92/135 x 60 = 40.89
	Pricing Score	45/55 x 40 = 32.73	45/50 x 40 = 36.00	45/45 x 40 = 40.00
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – List of Names

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

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

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

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

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

______________________________	______________________
SIGNATURE	**DATE**

5.2.3.2 Education and Experience

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

______________________________	______________________
SIGNATURE	**DATE**

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Statement of Work

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

6.1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract*.*

6.1.2.1 Task Authorization Process

Task Authorization:

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

Task Authorization Process:

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization Form for non-DND clients" *or* "DND 626, Task Authorization Form" *or* "Task Authorization" form specified in Annex D.

2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.

3. The Contractor must provide the Project Authority within five (5) calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.

4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

6.1.2.2 Task Authorization Limit

The Project Authority may authorize individual task authorizations up to a limit of $25,000.00, Applicable Taxes included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

6.1.2.4 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,

"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and

"Minimum Contract Value" means 10% of the Maximum Contract Value.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

6.1.2.5 Periodic Usage Reports - Contracts with Task Authorizations

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Contracting Authority.

The quarterly periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31; and

4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than ten (10) calendar days after the end of the reporting period.

Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

For each authorized task:

i. the authorized task number or task revision number(s);
ii. a title or a brief description of each authorized task;
iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
v. the start and completion date for each authorized task; and
vi. the active status of each authorized task, as applicable.

For all authorized tasks:

i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

6.2 Standard Clauses and Conditions

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

6.2.1 General Conditions

2035 (2015-07-03), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

6.2.2 Supplemental General Conditions

4007 (2010-08-16), Supplemental General Conditions – Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.3 Security Requirements

6.3.1 There is no security requirement applicable to this Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

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

6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Emily Gordon
Supply Specialist
Public Works and Government Services Canada
Communications Procurement Directorate
360 Albert Street
Ottawa, ON K1R 7X7

Telephone: 613-990-3140

Facsimile: 613-949-1281
E-mail address: Emily.Gordon@pwgsc-tpsgc.gc.ca

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

6.5.2 Project Authority

The Project Authority for the Contract is:

The name and contact information is to be provided in the resulting contract.

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

6.5.3 Contractor's Representative

The name and contact information is to be provided in the resulting contract.

6.6 Proactive Disclosure of Contracts with Former Public Servants

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

6.7 Payment

6.7.1 Basis of Payment

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

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

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

6.7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of **$(TBD)**. Customs duties are subject to exemption and Applicable Taxes are extra.

2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

    a. when it is 75 percent committed, or

    b. four (4) months before the contract expiry date, or

    c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,
    whichever comes first.

4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

6.7.3 Multiple Payments

Canada will pay the Contractor for work performed under the Task Authorization upon completion and delivery of the Work as provided by and specified in the Task Authorization and in accordance with the payment provisions of the Contract if:

i. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;

ii. all such documents have been verified by Canada;

iii. the Work delivered has been accepted by Canada.

6.7.4 Direct Request by Customer Department

SACC Manual Clause A9117C (2007-11-30) - T1204 - Direct Request by Customer Department

6.7.5 Discretionary Audit

SACC Manual Clause C0705C (2010-01-11) - Discretionary Audit

6.7.6 Time Verification

SACC Manual Clause C0711C (2008-05-12) - Time Verification

6.8 Invoicing Instructions

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

6.8.2 Invoices must be distributed as follows:

a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

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

6.9 Certifications

6.9.1 Compliance

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

6.10 Applicable Laws

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

6.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

a. the Articles of Agreement;
b. the supplemental general conditions 4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
c. the general conditions 2035 (2015-07-03), Higher Complexity - Services
d. Annex A, Statement of Work;
e. Annex B, Basis of Payment;
f. Annex C, Evaluation Grid,
g. Annex D, Task Authorization Form PWGSC-TPSGC 572;
h. Annex E, Insurance Requirements;
i. the signed Task Authorizations (including all of its annexes, if any);
j. the Contractor's bid dated ______.

6.12 Insurance

The Contractor must comply with the insurance requirements specified in Annex E. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than “A-”. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

6.12.1 Errors and Omissions Liability Insurance

SAAC Manual Clause G2002C (2008-05-12) Errors and Omissions Liability Insurance

6.13 Indemnity Against Morals Rights Infringement

The Contractor shall indemnify and save harmless Canada and the Minister from and against all claims, losses, damages, costs and expenses sustained or incurred by Canada unless caused by Canada or the Minister, resulting from any action or legal proceeding on infringement, made, sustained, brought, prosecuted, threatened to be brought or prosecuted, by any person that was under the direction and control of the Contractor during the term of this Contract and which person is claiming or claims a moral right, as set out under the Copyright Act.

The obligation to indemnify under this clause survives termination of this Contract and shall remain in force for the duration of the Copyright in the Work created under this Contract. In the alternate, the Contractor may provide written waivers of moral rights, signed and witnessed, from every single person that contributed to the writing, creating, producing or editing of the delivered work.

ANNEX "A"

STATEMENT OF WORK

Canada Revenue Agency Social Media Engagement

1.0 CONTEXT

As the second largest service organization in the federal government, the Canada Revenue Agency (CRA) touches the lives of more Canadians than any other government department with the exception of Employment and Social Development Canada. In 2013-2014, the CRA interacted with approximately 31 million individuals and corporate taxpayers, nearly 12 million benefit recipients, and answered over 22 million phone calls. The Agency recognizes multiple service channels are needed to better serve Canadians – and to serve them in a more cost-effective manner~~.~~

The CRA is committed to continually improving its service to Canadians. Recognizing that 92% of individuals file their returns and pay on time, the Agency has placed greater emphasis on assistive compliance. With this shift, there is a need to heighten financial literacy, including tax education and awareness about benefit entitlements, among targeted taxpayer segments noted below in this document. Canadians are increasingly receiving and sharing information in digital formats using online and mobile technologies – the CRA needs to provide high quality content that is easily shared in these formats. The work outlined in this Statement of Work will help us to better understand our target audiences – what information do they *need* to maximize their tax savings, and what information do they *want* to help them manage their tax affairs – so the CRA can better serve them.

2.0 INTRODUCTION

The CRA requires the service of a Contractor with experience and an innovative approach to developing and executing strategic digital engagement. The Contractor will develop a strategy to deliver targeted messaging on multiple topics to various audiences, generate online conversation, and recommend and build a variety of online communities of engaged Canadians. This approach will further the CRA's objective of providing Canadians with easy to access information about taxes and benefits so that they can fulfil their tax obligations and receive credits and benefits that they may be entitled to.

3.0 OBJECTIVE

The objective is to provide information about taxes and benefits to Canadians via social media, and to drive Canadians to the Canada.ca website – particularly the taxes, benefits and business theme pages – for more information. The challenge is <u>when</u>, <u>where</u> and <u>how</u> to speak to and engage with each target audience, <u>what</u> to say to them, and how to <u>measure</u> the effectiveness of the digital engagement efforts.

It is important to note that this project will be undertaken in an environment where Government of Canada (GC) social media channels (and management of the channels) are being reviewed. The Contractor will review Treasury Board of Canada documentation including the *Standard on Social Media Account Management* and *Guideline on Official Use of Social Media* to ensure that the CRA strategy is consistent with the GC approach. Furthermore, the Contractor will ensure that CRA information is reflected in GC social media initiatives such as the *My Money Matters* Facebook page (and others, as relevant).

Specifically, the CRA requires:

- A review and analysis of the current social media landscape to understand where taxes and benefits are being discussed and by whom;
- Include in the review of the social media landscape a review of where tax scams are being discussed and by whom

- A digital engagement strategy to deliver messaging to each target group, on a variety of tax and benefits topics relevant to each – the strategy should recommended Year 1 activities in detail and should recommend Year 2 and beyond activities more generally;
- A recommended set of tactics to engage the target groups – tactics could include social media (paid and unpaid[1]), digital marketing, blogger outreach, interactive tools, etc.;
- An implementation plan that outlines (and costs) two approaches:
  - The Contractor implementing the strategy;
  - The CRA implementing the strategy – for this approach, the Contractor will recommend the resources the CRA requires to proceed;
- An evaluation framework and methodology to assess the effectiveness of the social media engagement effort.

There are nine distinct target audiences to engage:
- Youth
- Seniors
- Aboriginal peoples
- New Canadians
- Persons with disabilities
- Charities
- Small and medium sized enterprises
- Tax preparers
- Potential employees.

These audiences generally require targeted information to achieve the following:
- Educate and increase awareness of Canada's tax system and being a responsible citizen
- Warn them about tax scams
- Improve tax literacy
- Provide information on credits and benefits available for specific audiences
- Promote the use of online services
- Enhance awareness of tax obligations and filing requirements
- Promote the range of employment opportunities at the Agency (potential employees)

3.1 EXPECTED RESULTS

This digital engagement project is expected to increase the number of Canadians who are aware of and seek information about taxes and benefits from relevant Web pages and/or social media platforms, in order to comply with their tax obligations. Specific measurable objectives and expected results will be proposed by the Contractor.

4.0 CRA's DIGITAL CHANNELS

The CRA uses or is contemplating using the following channels.

Twitter

The CRA has one corporate Twitter account (in each of English and French) that is used to provide relevant and timely information about a broad range of CRA programs and services. Our follower base has increased from 2,037 followers at the end of 2011 to more than 50,000 followers at the end of 2014, and continues to grow. The number of tweets we post, the number of times those tweets are re-tweeted by our followers, and the number of times people click on the links in our tweets have also grown over the past four years.

[1] If paid social media is recommended it would not be undertaken by the Contractor.

Since 2012 we have also been replying to questions and comments on Twitter when the interaction met specific criteria for engagement. During tax filing season for 2014 (calendar year 2015), we engaged with followers more than 300 times on Twitter by providing links to the requested information or redirecting followers to our official service channels as appropriate. In 2014 we invited students to engage with us in the CRA's first ever live tweet chat on the subject of students and income tax. We repeated the #StudentsAskCRA tweet chat in 2015.

In March 2015, in the context of the annual Tax Relief Measures advertising campaign, the CRA used promoted tweets for the first time, generating more than 2.6 million impressions during the campaign.

Currently future plans include:

- Continuing to tweet several times a day, with approximately 80% of our content being pre-scheduled from our tweet bank in biweekly calendars. The remaining 20% of our Twitter content is reactive.
- Continuing to hold tweet chats where appropriate with key CRA audiences over the coming months.
- Collaborating with other government departments on social media content around high-profile government initiatives and supporting the move to themed Government of Canada social media accounts.

<u>YouTube</u>
As of June 2015 the CRA has 99 videos posted in each of English and French in a variety of styles across the range of CRA's programs and services, including playlists for individual taxpayers and benefit recipients, businesses, charities and newcomers to Canada. In 2015 we surpassed 2.5 million views on the various videos posted to our YouTube channels since the channels (E and F) were launched in 2009.

<u>Pinterest, LinkedIn and Facebook</u>
The CRA is currently exploring Pinterest. We have recently added a "stub" page to establish our presence on LinkedIn. The CRA has no plans for a Facebook presence, and instead supplies content to Government of Canada themed Facebook accounts via Your Money Matters (personal finance) and a pending themed account for Canadian small businesses.

5.0 SERVICES REQUIRED

Account Management and Coordination Services

Roles and responsibilities:

<u>Account Manager</u>

- Provide day-to-day account management as relates to social listening, strategy development and implementation (as required).
- Ensure that all procedures for the contract and TAs have been followed and correct documentation is in place.
- Document all activities in all categories of service and all direct costs that include the level of effort (time and resources) to deliver the services required by the Project Authority
- Adhere to all procedures (including budgets, time, and staff resources) and ensure that correct documentation is in place.
- Manage all resources working on the development and production of the project materials outlined in this Statement of Work.
- Attend client briefings and meetings, and participate in conference calls as required.
- Provide cost reports, budgets and work schedules, produce timely estimates for approval, and advise of budget variances.
- Supervise and report on any work produced by approved subcontractors.

Account Administrative Services

- Provide project status updates.
- Provide monthly cost reports, including breakdown by personnel, resources, travel and rates.
- Provide cost estimates as requested by the CRA.
- Provide bi-weekly financial reporting, including short-term estimations on upcoming work, and cost overviews of previous work done during the two week period.

Digital Engagement and Interactive Strategic Services

Roles and responsibilities:

Digital Engagement Strategist

- Conduct extensive research to analyse the current social media landscape and understand where taxes and benefits are being discussed and by whom.
- Provide a long-term overarching digital engagement strategy, with measurable objectives and costed implementation plan.

Creative Services

Roles and responsibilities:

Creative Director

- Write, design and produce products recommended in social engagement strategy.
- Adapt and translate into both official languages.
- Oversee production of products
- Provide quality control.
- Liaise with advertising agency if and as required.

Measurement and Analytics Services

Roles and responsibilities:

Senior Analyst

- Evaluate social media platforms to assess performance and compare with goals and objectives.
- Provide recommendations on how to enhance performance of the channels.
- Keep pace with social media and internet marketing industry trends and developments.
- Prepare and present weekly, monthly and yearly dashboards (as required to and agreed upon with Project Authority).
- Generate reports on performance of social media channels.
- Provide analysis and recommendations as the channels evolve.

This requirement does not include the following mandatory services provided by PWGSC.

- Advertising services
- Public opinion research and survey

The contractor may be required to consult and collaborate with other suppliers who have been mandated to provide services for other components related to these initiatives.

6.0 DELIVERABLES

The initial task authorizations will include:

1) **Social Media Engagement Strategy**

The initial task authorization will be for research and delivery of the Social Media Engagement Strategy (a strategy that is consistent with and reinforces the GC approach to social media) including:

- Research and social media listening to understand where and by whom taxes and benefits and where tax scams are being discussed for all nine target audiences;
- Analysis of CRA social media channels (including analytics)
- Short-term strategy (1-2 years) to optimize our social media presence for each target audience including recommendations on:
- when, where and how to engage with the target audiences,
- what to say to them,
- what tactics and tools to use
- Measurement framework.

This first draft of the Strategy will be due on January 29, 2016.

2) Implementation Plan

Based on approved Strategy the Contractor will provide two options for implementation:

- Option 1: the Contractor develops the deliverables and implements the strategy.
- Option 2: the Contractor recommends resources that the CRA requires in order to undertake implementation.

First draft of the implementation plan will be due on February 29, 2016

3) An evaluation framework and methodology to assess the effectiveness of the social media engagement effort.

First draft of the evaluation framework and methodology will be due on February 29, 2016

The finalized strategy, implementation plan and evaluation framework will be due on March 31, 2016.

4) Other Reports and Communications:

The Contractor will report to the Project Authority regularly throughout the project as follows:

- Weekly status reports detailing all projects being worked on indicating current status, next steps, agency teams, and due dates;
- Contact reports (as required) detailing overall discussion points and decisions;
- Monthly budget control reports, including overall summary of costs incurred to date on each planned project and forecasted final projected cost as compared to estimates and overall budgets. All financial reports shall be prepared in accordance with Generally Accepted Accounting Principles (GAAP);
- Evaluation reports, as required. (Evaluation reports will be required if the Contractor undertakes implementation. The number of evaluation reports will be specified at that time.);
- Post-mortem report at agreed upon intervals, summarizing the planning, development and implementation of the strategy, including results, lessons learned, recommendations, etc. (Post-mortem reports will be required if the Contractor undertakes implementation. The number of evaluation reports will be specified at that time.)

7.0 WORK IN OPTION YEARS

Once a decision is made regarding whether the Contractor or the CRA will implement the strategy, the following services may be required in option years, and will be confirmed in a subsequent Task Authorization.

If the Contractor implements the strategy tasks could include[2]:
- Working with various social media to negotiate inclusion of CRA editorial content relevant to CRA target audiences
- Writing and producing the editorial content that for the various social media platforms, targeting relevant CRA audience groups
- Conceiving, designing and producing final creative materials for inclusion on various social media platforms
- Exploring and negotiating potential partnerships with various social media platforms

If the Contractor is not implementing the strategy, tasks could include:
- Undertaking analysis of requirements for the CRA to undertake implementation
- Development of operational plans that will guide the CRA in obtaining the resources required to undertake implementation
- Providing advice and guidance to CRA resources as they undertake implementation.

8.0 CONSTRAINTS

Work and Contract Constraints
The Contractor should be aware of the following constraints that will affect how the work must be done.

Policies and Acts
The GC implements advertising in compliance with procedures and regulations of the Communications Policy of the Government of Canada, the Federal Identity Program Policy (Section 5(6) and Appendix A, sub-sections 3.2, 3.3), the Contracting Policy, the Official Languages Act (Articles 7, 11, 12, 13, and 30), the Multiculturalism Act, Common Services Policy, the Privacy Act, the Standard on Web Accessibility (see section A.11 - Reference Web Sites), the Standard on Social Media Account Management, the Technical Specifications for Social Media Account Management, and the Guideline on Official Use of Social Media.

The Contractor must maintain financial records in support of each government institution's responsibilities under the Financial Administration Act and provide information in support of each government institution's responsibilities under the Access to Information Act. See A.11, Reference Websites.

Approval Process
The Contractor must submit all required materials to the Project Authority who will be responsible for approvals and receiving all final deliverable materials. All work is to be performed to the satisfaction of the Project Authority or this person's designated representative in accordance with the terms and conditions of the contract and approved estimates.

The Project Authority will acquire appropriate approvals as required.

Should any part of the project not be satisfactory, the Project Authority may request that it be corrected or changed before approving payment.

It is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Authority and to immediately notify the Project Authority of any issues, problems, or areas of concern in

[2] Work undertaken will not include any paid social media that is considered to be advertising.

relation to any work completed under the Contract, as they arise. Finally, the Contractor will respond to requests from the Project Authority within twenty four (24) hours or less of receiving the request.

Task Authorization Process
Under the Task Authorization Contract, Specific Tasks, Activities, Deliverables and Project Time lines or Milestones will be determined by the Project Authority at the time of each requirement. Under the terms and conditions of the resulting TA contract, the Contractor may expect to engage in a combination of activities as outlined in this document.

Hourly rates submitted in the financial proposal for each period of the contract will be used as reference for individual projects under the TA. Hourly rates submitted on an individual project under a TA cannot exceed the hourly rates submitted in the Contractor's proposal.

9.0 ASSISTANCE PROVIDED BY THE CRA

- Providing background information and/or relevant research that may inform the Strategy, as required;
- Arranging for meetings, as required;
- Reviewing materials submitted by the Contractor and work with the Contractor to revise and enhance the material according to the agreed upon processes and timelines;
- Coordinating the overall project, providing, as required, feedback, direction and guidance to the Contractor, and accepting and approving the Contractor deliverables on behalf of the CRA;
- Providing other assistance or support, including access to subject-matter experts as required; and
- Ensuring that approvals are provided in accordance with the agreed-upon processes and timelines.

10.0 LOCATION OF WORK

All work related to this project will be done at the Contractor's offices. The Contractor will be expected to attend any meetings as requested by the Project Authority (either in person or by teleconference call).

11.0 LANGUAGE OF WORK

The contractor shall be capable of correspondence with the CRA in relation to the contract in either or both Official Languages (English/French) of Canada. However, all deliverables shall be produced and delivered in both English and French. The Contractor will be responsible for all translation costs.

ANNEX "B"

BASIS OF PAYMENT

The Bidder must submit firm, all-inclusive hourly rates as follows, for work performed to provide the service described in the Annex A – Statement of Work, in accordance with any resulting Task Authorization under the Contract.

The firm, all-inclusive hourly rates include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only GST and HST if applicable. All expenses normally incurred in providing the services (i.e. project office space (including Contractor's hardware and software), word processing, work estimates, photocopying, courier and telephone charges, local travel* and the like) are included in the firm hourly rates identified herein, and will not be permitted as direct charges under the Contract.

*Local travel is defined as within 100km of the place of business of the Bidder.

The Contractor is not permitted to charge hourly rates to prepare work estimates for Task Authorizations.

The rates must be in Canadian currency, Customs duties are included and Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable.

Bidders must submit the firm, all-inclusive hourly rates for each of the four (4) categories of services.

The firm all-inclusive hourly rates will be used in the evaluation. If pricing is not provided for a component, a price of zero will be assigned for the component and the Bidder will be provided an opportunity to agree with the zero amount.

If the Bidder agrees then the Basis of Payment will be considered compliant. However if the Bidder disagrees then the proposal will be found non-compliant and no further evaluation will be done.

Table 1 - Contract Period:

Category of Service	HOURLY RATE INITIAL CONTRACT PERIOD
ACCOUNT MANAGEMENT AND COORDINATION SERVICES	
Account Management Services	$_____
DIGITAL ENGAGEMENT AND INTERACTIVE STRATEGIC SERVICES	
Digital Engagement Strategist	$_____
CREATIVE AND PRODUCTION MANAGEMENT SERVICES	
Creative Direction	$_____
MEASUREMENT AND ANALYTICS SERVICES	
Senior Analyst	$_____
Total Evaluated Price for Contract Period (A):	

Table 2 - Option Period 1:

Category of Service	HOURLY RATE OPTION PERIOD 1
ACCOUNT MANAGEMENT AND COORDINATION SERVICES	
Account Management Services	$_____
DIGITAL ENGAGEMENT AND INTERACTIVE STRATEGIC SERVICES	
Digital Engagement Strategist	$_____
CREATIVE AND PRODUCTION MANAGEMENT SERVICES	
Creative Direction	$_____
MEASUREMENT AND ANALYTICS SERVICES	
Senior Analyst	$_____
Total Evaluated Price for Option Period 1 (B):	

Table 3 - Option Period 2:

Category of Service	HOURLY RATE OPTION PERIOD 2
ACCOUNT MANAGEMENT AND COORDINATION SERVICES	
Account Management Services	$_____
DIGITAL ENGAGEMENT AND INTERACTIVE STRATEGIC SERVICES	
Digital Engagement Strategist	$_____
CREATIVE AND PRODUCTION MANAGEMENT SERVICES	
Creative Direction	$_____
MEASUREMENT AND ANALYTICS SERVICES	
Senior Analyst	$_____
Total Evaluated Price for Option Period 2 (C):	

Table 4 - Option Period 3:

Category of Service	HOURLY RATE OPTION PERIOD 3
ACCOUNT MANAGEMENT AND COORDINATION SERVICES	
Account Management Services	$_____
DIGITAL ENGAGEMENT AND INTERACTIVE STRATEGIC SERVICES	
Digital Engagement Strategist	$_____
CREATIVE AND PRODUCTION MANAGEMENT SERVICES	
Creative Direction	$_____
MEASUREMENT AND ANALYTICS SERVICES	
Senior Analyst	$_____
Total Evaluated Price for Option Period 3 (D):	

Total Evaluated Price for Contract Period (A):	**$_____**
Total Evaluated Price for Option Period 1 (B):	**$_____**
Total Evaluated Price for Option Period 2 (C):	**$_____**
Total Evaluated Price for Option Period 3 (D):	**$_____**
TOTAL ALL INCLUSIVE BID EVALUATION VALUE (BEV) FOR EVALUATION PURPOSES ONLY* (TOTAL TABLES 1-4)	**$_____**
****NOTE: Although the BEV is calculated for evaluation purposes only and will not form part of any resulting Contract, the prices and rates quoted by the Bidder in Tables 1, 2, 3, and 4 will apply to any resulting Contract and Task Authorization as indicated herein.***	

B.2 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditure reasonably and properly incurred to acquire goods and services from outside suppliers at the supplier's price, net of any trade or prompt payment discounts.

FOR EACH SUBCONTRACTED SERVICE OVER $25,000.00 (GST / HST INCLUDED)
The Contractor must obtain competitive bids from no less than three (3) outside suppliers. The Contractor must provide to the Contracting Authority and the Project Authority, the names of the suppliers who submitted bids, the total amount of each bid obtained, the selection criteria and results. A subcontracted service over $25,000 (GST/HST included) applies to the total aggregate of the dollar value of each subcontracted service per resulting Task Authorization against the Contract.

B.2.2 DIRECT EXPENSES

The Contractor will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the Work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers, given the service(s) is/are documented in the approved Task Authorization against the Contract. All such direct expenses must have prior authorization of the Project Authority.

B.3 TRAVEL AND LIVING EXPENSES

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

All payments are subject to audit by Canada.

All travel must have prior authorization of the Project Authority.

ANNEX "C"

EVALUATION GRID

EVALUATION SUMMARY		
1.1 MANDATORY REQUIREMENTS		
M1. Key Personnel Identification (Curriculum Vitae (CV))	❑ **MET**	❑ **NOT MET**
M2. Experience of the Firm	❑ **MET**	❑ **NOT MET**
M3. Financial Offer	❑ **MET**	❑ **NOT MET**
1.2 RATED REQUIREMENT	**MINIMUM POINTS**	**SCORE ACHIEVED**
R1. Approach and Methodology		
R1.1 Understanding of the Requirement	24 points	____ /30 points
R1.2 Project Management Approach	24 points	____ /30 points
R2. Case Studies	32 points	____ /40 points
R3. Project Deliverables	32 points	____ /40 points
OVERALL TOTAL	**112 points**	**____ /140 points**

EVALUATION TEAM SIGNATURES:

______________________________ Date:________________________

______________________________ Date:________________________

______________________________ Date:________________________

______________________________ Date:________________________

______________________________ Date:________________________

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

PART 1 - TECHNICAL EVALUATION – MANDATORY TECHNICAL CRITERIA

Bidders must meet all the mandatory requirements of the RFP. No further consideration will be given to Bidders not meeting all the mandatory criteria.

To meet the requirement described herein, the experience of the Bidder must be work for which the Bidder was under contract to external clients. During the evaluation no corporate experience gained through internal clients will be accepted or reviewed. In the case of a joint venture, the combined experience of the parties forming the joint venture will be considered in the evaluation of the experience of the Bidder.

Listing experience without providing any supporting data to describe where and how such experience was obtained will result in the experience not being included for evaluation purposes.

Definitions for the purposes of evaluation:

"External client(s)" means clients exterior to the Bidder's own legal entity (or joint venture partnership) and excludes the parent, subsidiaries or other affiliates of the Bidder.

"Internal client(s)" means clients within the Bidder's own legal entity (or joint venture partnership) and includes the parent, subsidiaries and other affiliates of the Bidder.

"Relevant experience" means demonstrated experience to meet the minimum qualifications specified for each of the key personnel.

Evaluation Criteria	Met	Not met
M.1. Key Personnel Identification (Curriculum Vitae (CV))		
The Bidder must clearly identify the proposed key personnel for the following roles: • Account Manager Minimum Required Qualifications: • Three (3) years' experience in Account Management and a post-secondary degree or diploma in a related field; or • Five (5) years' experience in Account Management. • Digital Engagement Strategist Minimum Required Qualifications: • Two (2) years' experience in developing Digital Engagement and Interactive Strategy as well as post-secondary degree or diploma in marketing, digital/internet, computer science or a related field; or • Four (4) years' experience in developing Digital Engagement and Interactive Strategy • Creative Director Minimum Required Qualifications: • Three (3) years' experience in Creative Direction for social media, and a post-secondary degree or diploma in a related field; or		

- Five (5) years' experience in Creative Direction

- Senior Analyst
  Minimum Required Qualifications:
  - Three (3) years' experience in analytics for social media, and a post-secondary degree or diploma in a related field; or
  - Five (5) years' experience in analytics for social media

Each of the key personnel must meet the minimum required qualifications, as specified for each of the identified roles. The Bidder may propose the same individual for more than one (1) role, provided that the individual meets the minimum required qualification for each role.

The period of time that the proposed key personnel worked in each identified place of employment will be added to determine the number of years' experience for evaluation purposes.

The Bidder must provide résumés for all identified key personnel proposed to provide the services as described in the Statement of Work at Annex "A". The following information must be included: their education/training, their work history and their relevant experience (including dates).

Name of proposed Personnel:	Resume		Minimum criteria met	
	Yes	No	Yes	No
Account Manager ______________	☐	☐	☐	☐
Digital Engagement Strategist ______________	☐	☐	☐	☐
Creative Director ______________	☐	☐	☐	☐
Senior Analyst ______________	☐	☐	☐	☐

Comments:

Evaluation Criteria	Met	Not met
M.2. Experience of the Firm		
M 2.1 The Bidder must demonstrate that it has been contractually bound to an external client or to external clients (outside of the Bidder's own company) for two (2) on-going or completed projects to provide digital social media engagement services as described in the Annex A Statement of Work (SOW). The two (2) on-going or completed projects must have been completed on or after January 1, 2012, or initiated before February 1, 2015. One (1) project must include or have included deliverables developed in English and one (1) project must have must have included deliverables developed in French or bilingually (in English and in French). If a bilingual project is submitted, the Bidder cannot submit the French and English versions of the deliverables for the same project as their two (2) project samples for evaluation. A minimum of one (1) of the two (2) projects must include the launch of a social media platform. During the evaluation no corporate experience gained through internal clients will be accepted or reviewed. Each of the two (2) projects must include or have included all of the following services: • Developing strategies for social media engagement that include: o Reviewing and analyzing the current social media landscape to inform development of the social media strategy including analysis of multiple target audiences and latest social media trends. o Analyzing and recommending digital engagement and interactive tactics to engage target audiences; o Developing social media content • Developing and implementing a social media engagement campaign		

• Developing an evaluation framework to assess the effectiveness of the social media engagement efforts. **M 2.2** The Bidder must provide a case study description of each of the two (2) project samples. The Bidder must include all the following information for <u>each</u> of the two (2) project case studies submitted: • Title and summary description of the project; • A description of the target audience; • Description of the services provided or to be provided for the project; • Overall creative approach to meet client objectives; • List of deliverables of the project; • Completion date or initiation date; • Client information; The two (2) case studies will be evaluated in the R.2 point rated technical evaluation criterion. **M 2.3** For each of the two (2) projects, the Bidder must provide an electronic copy of two (2) deliverables completed and delivered to the Client as part of the project. The Bidder must provide the samples of the deliverables on USB. The deliverable must be a creative asset (written, graphic or a combination of both) produced for deployment on a social media channel. The two (2) deliverables for each of the two (2) projects (a total of four [4]) deliverables) will be evaluated in the R.3 point rated technical evaluation criterion.		
Comments:		

Evaluation Criteria	Met	Not met
M.3. Financial Proposal		
The Bidder must provide costing information strictly in accordance with the Basis of Payment at Annex B. Any deviation from the pricing schedule will render your offer non-responsive.		
Comments:		

FAILURE TO PROVIDE DETAILED INFORMATION FOR ANY OF THE ABOVE MAY RESULT IN THE PROPOSAL BEING DEEMED NON-RESPONSIVE. BIDS NOT MEETING THE ALL THE MANDATORY REQUIREMENTS WILL BE GIVEN NO FURTHER CONSIDERATION.

PART 2 – TECHNICAL EVALUATION – POINT RATED TECHNICAL CRITERIA

Only those proposals which first meet the Mandatory Requirements will be considered in the second stage of the evaluation, the Technical Evaluation.

To be considered compliant, bidders must obtain a minimum passing mark of 80% for each of the point rated criteria and each of the sub-criteria (R.1.1, R.1.2, R.2, and R.3) of the point rated technical evaluation criteria. The rating is performed on a scale of **100 points**. Proposals scoring less than 80% for each of the point rated criteria and each of the sub-criteria (R.1.1, R.1.2, R.2, and R.3) of the point rated technical evaluation criteria will not be given further consideration.

Bidders are instructed to address each requirement in sufficient depth to permit a complete analysis and assessment by the Evaluation Team.

Proposals will be evaluated on the completeness and level of detail by which they address the rated requirements. For example, if a description of a process or procedure is requested, the various steps which the Bidder will perform in order to complete the requirement, as detailed in the Annex A Statement of Work (SOW), should be described.

General statements should be avoided. These do not provide details which can be compared to the description of the requirement and therefore evaluated as to their relevancy in fulfilling the requirement, as detailed in the SOW.

Assessment of proposals will be based solely on the information in the Proposal. Canada may seek further information or clarification from the bidder.

The points allocated for selected criteria will be multiplied by the specified weighting factor (w.f.).

R.1. APPROACH AND METHODOLOGY

R.1.1 Understanding of the Requirement (Maximum of 30 points – Minimum of 24 points)

The Bidder should describe the methodology that it will use to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms, and the social media behaviour of the target audiences identified in the Annex A Statement of Work. The Bidder should also provide details to describe the most effective methods to communicate with the target audiences. The description should outline any challenges in meeting Canada Revenue Agency's overall digital engagement objectives for the target audiences and the Bidder's proposed solutions.

There are nine (9) distinct target audiences:

- Youth
- Seniors
- Aboriginal peoples
- New Canadians
- Persons with disabilities
- Charities
- Small and medium sized enterprises
- Tax preparers
- Potential employees.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements are described or are poorly described · Not enough details are provided to assess how the Bidder's approach and methodology will be used to meet to the requirements as described in Annex A - Statement of Work. OR Not enough details are provided to assess how the Bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. OR Details do not provide evaluators with an understanding of the social media behavior of the target audience and/or how to effectively communicate with it. OR The description does not outline any challenges in meeting the digital engagement objectives or does not provide any solutions.
0.8	Good	· Most elements present · Most elements are well described · Details provide evaluators with an understanding of the social media behavior of the target audience and how to effectively communicate with it. · Details provided to describe how the Bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. · The description provides details to outline the challenges in meeting the digital engagement objectives with some solutions.
0.9	Very Good	· All elements present

		· Most elements are well described · Substantial details provide evaluators with an understanding of the social media behavior of the target audience and how to effectively communicate with it. · Details provided to describe how the Bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. The description provides details to outline the challenges in the digital engagement objectives with solutions.
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the social media behavior of the target audience and how to effectively communicate with it. · Substantial details provide evaluators with a clear understanding of how the bidder's approach and methodology will be used to research and identify the conversations that are taking place about taxes and benefits, and scams, on various social media platforms. · The description provides clear details to outline the challenges in meeting the digital engagement objectives with well thought-out solutions.

Points Allocated for R1.1:_____/ 30

R.1.2 Project Management Approach (Maximum of 30 points – Minimum of 24 points)

The Bidder should propose a preliminary project management approach that provides flexibility and considers client needs as described in this RFP. It should reflect how the Bidder proposes to work in collaboration with the Project Manager and Project Team and outline the key areas that require input from the Client. It should illustrate how the Bidder will ensure that performance, quality, and scheduled goals are achieved.

The Bidder should provide a detailed description of the proposed project management approach and procedures, schedule controls, risk mitigation, as well as the tools and techniques that will be used to plan, organize, direct and control the Project. The project management approach should also outline how the Bidder proposes to work in collaboration with the Project Authority to insure sufficient time for review and Government approval process.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements are described or are poorly described · Does not provide details to assess how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. OR Does not provide details to describe the tools and techniques that will be used to plan, organize, direct, and control the project. OR · Does not identify any interaction between the Bidder and the Project Authority.
0.8	Good	· Most elements present · Most elements are well described · Details provided lead to a good understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project. · Details lead to an understanding of the interaction between the Bidder and the Project Authority.
0.9	Very Good	· All elements present · Most elements are well described · Substantial details lead to a good understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project. · Substantial details lead to a good understanding of the interaction between the Bidder and the Project Authority.
1	Excellent	· All elements present · All elements are well described · Substantial details lead to a complete and thorough understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved. · Clear details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project.

		Substantial details lead to a complete and thorough understanding of the interaction between the Bidder and the project Authority and how the Bidder proposes to work in collaboration with the Project Authority to ensure sufficient time for government of Canada approval processes.

Points Allocated for R1.2:_____/30

Total points allocated for the Rated Criteria R.1: ________ / 60 points

R.2 Case Studies (Maximum of 40 points – Minimum 32 points)
A maximum of 20 points will be allocated for each Case Study

For each of the two (2) Case Studies submitted for M.2 the Bidder should provide the following information:

- The timeframes for the social listening period and implementation period;
- How the social media landscape review was undertaken (e.g., general methodology used, methodology used for various audiences);
- Review of latest social media trends and how these trends could affected the approach to the stated target audiences;
- The overall digital engagement strategy and interactive engagement tactics;
- How key insights from the review of the social media landscape were used to target particular audiences;
- The evaluation framework and why it was recommended to assess the effectiveness of the social media engagement efforts;
- The results of the social media engagement efforts to date, referencing measurable objectives and how they were met.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements presented are described or are poorly described OR Details do not provide evaluators with an understanding of the objectives of the project as described in the case study. OR Details do not provide evaluators with an understanding of how the project objectives, as described in the case study, were met. OR · The case study does not demonstrate appropriateness for the stated target audience
0.8	Good	· Most elements present · Most elements are well described · Details provide evaluators with an understanding of the objectives of the project, and how the client objectives, as described in the case study, were met. · The case study demonstrates appropriateness for the stated target audience
0.9	Very Good	· All elements present · Most elements are well described · Details provide evaluators with a good understanding of the objectives of the project, and how the client objectives, as described in the case study, were met · The case study demonstrates appropriateness for the stated target audience
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the objectives of the project, and how the client objectives, as described in the case study were met

		· The case study demonstrates appropriateness for the stated target audience
Points Allocated for R.2 – Case Study 1:_____/20		
Points Allocated for R.2 – Case Study 2:_____/20		

Total points allocated for the Rated Criteria R.2: ________ / 40 points

R.3 Project Deliverables (Maximum of 40 points – Minimum 32 points)
A maximum of 10 points will be allocated for each Sample of the Project Deliverables

For each of the two (2) deliverables provided for each of the two (2) projects submitted for M.2 the Bidder should provide the following information:

- A brief description of the deliverable
- The final format of the deliverable produced for the project
- The objective of the deliverable
- How the deliverable was used to meet the project objectives

The deliverable must be a creative asset (written, graphic or a combination of both) produced for deployment on a social media channel.

For evaluation of deliverables: provide two (2) digital samples of final versions of the materials, (on CD, DVD or flash drive) formatted for viewing in Microsoft Windows to include:
- Image Files - .pdf file type;
- Video Files - QuickTime for Windows - .mov file type - .avi file type / H.264 compression / 4:3 NTSC (i.e. 640x480) or 16:9 NTSC (i.e. 720x480) / 8Mbps / 16 bit, stereo, 48khz;
- Audio Files -mp3, stereo, 128kbps.

0	Unsatisfactory	· Information required was not provided · Few elements present · Not all elements presented are described or are poorly described OR Details do not provide evaluators with an understanding of the objectives of the deliverable. OR Details do not provide evaluators with an understanding of how the deliverable was used to meet the project objectives OR · The Sample of the deliverable does not demonstrate appropriateness for the stated target audience
0.8	Good	· Most elements present · Most elements are well described · Details provide evaluators with an understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives. · The Sample of the deliverable demonstrates appropriateness for the stated target audience
0.9	Very Good	· All elements present · Most elements are well described · Details provide evaluators with a good understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives. · The Sample of the deliverable demonstrates appropriateness for the stated target audience
1	Excellent	· All elements present · All elements are well described · Substantial details provide evaluators with a clear understanding of the objectives of the deliverable, and how the deliverable was used to meet the client objectives.

		· The Sample of the deliverable demonstrates appropriateness for the stated target audience
Points Allocated for R.2 – Project 1 – Sample of deliverable 1:_____/10		
Points Allocated for R.2 – Project 1 – Sample of deliverable 2:_____/10		
Points Allocated for R.2 – Project 2 – Sample of deliverable 1:_____/10		
Points Allocated for R.2 – Project 2 – Sample of deliverable 2:_____/10		

Total points allocated for the Rated Criteria R.3: ________ / 40 points

SUMMARY OF POINTS AWARDED TO BIDDER			
Rated Criteria	**Maximum Points**	**Minimum Points**	**Points Awarded to Bidders**
R.1 APPROACH AND METHODOLOGY			
R.1.1 Understanding of the Requirement	30	24	
R.1.2 Project Management Approach	30	24	
TOTAL			
R.2 PROJECT SAMPLES	**40**		
R.2 Project Samples	40	32	
R.3 PROJECT DELIVERABLES			
R.2 Project Deliverables	40	32	
TOTAL			
OVERALL TOTAL	140	112	

ANNEX "D"

TASK AUTHORIZATION FORM PWGSC-TPSGC 572

Public Works and Government Services Canada | Travaux publics et Services gouvernementaux Canada

Annex
Annexe ____

Task Authorization
Autorisation de tâche

	Contract Number - Numéro du contrat
Contractor's Name and Address - Nom et l'adresse de l'entrepreneur	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu
	Total Estimated Cost of Task (Applicable taxes extra) Coût total estimatif de la tâche (Taxes applicables en sus) $

Security Requirements: This task includes security requirements
Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité

☐ No - Non ☐ Yes - Oui If YES, refer to the Security Requirements Checklist (SRCL) included in the Contract
Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat

For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu	Total Estimated Cost of Task (Applicable taxes extra) before the revision Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision	Increase or Decrease (Applicable taxes extra), as applicable Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu
	$	$

Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.

Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.

1. Required Work: - Travaux requis :

A.Task Description of the Work required - Description de tâche des travaux requis — See Attached - Ci-joint ☐

B. Basis of Payment - Base de paiement — See Attached - Ci-joint ☐

C. Cost of Task - Coût de la tâche — See Attached - Ci-joint ☐

D. Method of Payment - Méthode de paiement — See Attached - Ci-joint ☐

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Annex
Annexe ____

Contract Number - Numéro du contrat

2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

Name and title of authorized client - Nom et titre du client autorisé à signer

Signature

Date

PWGSC Contracting Authority - Autorité contractante de TPSGC

Signature

Date

3. Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized - to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature

Date

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ANNEX E

INSURANCE REQUIREMENT

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than $2,000,000 per accident or occurrence and in the annual aggregate.

2. The Commercial General Liability policy must include the following:

a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

g. Employees and, if applicable, Volunteers must be included as Additional Insured.

h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

m. Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

n. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.

o. Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:

Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.