



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

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

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

**Place du Portage, Phase III**

**Core 0B2 / Noyau 0B2**

**Gatineau**

**Québec**

**K1A 0S5**

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

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

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

**Comments - Commentaires**

<b>Title - Sujet</b> Marketing & Communication Services	
<b>Solicitation No. - N° de l'invitation</b> B8803-160322/A	<b>Date</b> 2015-11-25
<b>Client Reference No. - N° de référence du client</b> B8803-16-0322	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CX-026-68467	
<b>File No. - N° de dossier</b> cx026.B8803-160322	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2015-12-15</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Standard Time EST
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Andruchow(CX Div.), Cassandra	<b>Buyer Id - Id de l'acheteur</b> cx026
<b>Telephone No. - N° de téléphone</b> (613) 993-7846 ( )	<b>FAX No. - N° de FAX</b> (613) 991-5870
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF CITIZENSHIP AND IMMIGRATION JTS 19TH FL 365 LAURIER AVE OTTAWA Ontario K1A1L1 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Communication Procurement Directorate/Direction de  
l'approvisionnement en communication

360 Albert St. / 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

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

## **TABLE OF CONTENTS**

### **PART 1 - GENERAL INFORMATION**

- 1.1 INTRODUCTION
- 1.2 SUMMARY
- 1.3 DEBRIEFINGS

### **PART 2 - BIDDER INSTRUCTIONS**

- 2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS
- 2.2 SUBMISSION OF BIDS
- 2.3 FORMER PUBLIC SERVANT
- 2.4 ENQUIRIES - BID SOLICITATION
- 2.5 APPLICABLE LAWS
- 2.6 BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY

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

- 3.1 BID PREPARATION INSTRUCTIONS

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

- 4.1 EVALUATION PROCEDURES
- 4.2 BASIS OF SELECTION

### **PART 5 - CERTIFICATIONS**

- 5.1 CERTIFICATIONS REQUIRED WITH THE BID
- 5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION

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

- 6.1 STATEMENT OF WORK
- 6.2 STANDARD CLAUSES AND CONDITIONS
- 6.3 SECURITY REQUIREMENTS
- 6.4 TERM OF CONTRACT
- 6.5 AUTHORITIES
- 6.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS
- 6.7 PAYMENT
- 6.8 INVOICING INSTRUCTIONS
- 6.9 CERTIFICATIONS
- 6.10 APPLICABLE LAWS
- 6.11 PRIORITY OF DOCUMENTS
- 6.12 INSURANCE
- 6.13 IDEMNITY AGAINST MORALS RIGHTS INFRINGEMENT
- 6.14 COPYRIGHT

- ANNEX "A" STATEMENT OF WORK
- ANNEX "B" BASIS OF PAYMENT
- ANNEX "C" EVALUATION GRID
- ANNEX "D" ANNEX D TO PART 5 - BID SOLICITATION
- ANNEX "E" INSURANCE REQUIREMENT
- ANNEX "F" TASK AUTHORIZATION FORM PWGSC-TPSGC 572

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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 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, Evaluation Grids, Federal Contractors Program for Employment Equity Certification and Declaration of Offences Form, Insurance Requirement, and Task Authorization Form PWGSC-TPSGC 572.

### 1.2 Summary

The purpose of this Request for Proposal (RFP) is to seek proposals from bidders interested in providing marketing and communication services as outlined in the Statement of Work at Annex "A", on an 'as and when requested basis' to Citizenship and Immigration Canada (CIC).

The resulting contract will be in effect from the date of issuance until March 31, 2019 and will include two (2) option periods of twelve (12) months.

For services requirements, Bidders must provide the required information as detailed in article 2.3 of Part 2 of the bid solicitation, in order to comply with Treasury Board policies and directives on contracts awarded to former public servants."

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

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

The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 6 - Resulting Contract Clauses and the Annex "D" titled Federal Contractors Program for Employment Equity - Certification."

### 1.3 Debriefings

After contract award, Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing will be in writing.

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## 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.

#### 2.1.1 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.

### 2.2 Submission of Bids

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

### 2.3 Former Public Servant

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

#### Definitions

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

### Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

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

### Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

## 2.4 Enquiries - Bid Solicitation

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

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

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Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

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## **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**

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

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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

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

Section I: Technical Bid (5 hard copies and 1 soft copy on USB key)

Section II: Financial Bid (2 hard copies and 1 soft 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) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

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

#### Section I: Technical Bid

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

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

#### Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B". The total amount of Applicable Taxes must be shown separately, if applicable.

#### Section III: Certifications

Bidders must submit the certifications required under Part 5.

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## 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 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

The Mandatory technical evaluation criteria are fully described in Annex "C".

##### 4.1.1.2 Point Rated Technical Criteria

The Point Rated technical evaluation criteria are fully described in Annex "C".

#### 4.1.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes are to be included.

### 4.2 Basis of Selection

#### 4.2.1 To be declared responsive, a bid must:

- a) comply with all the requirements of the bid solicitation;
- b) meet all mandatory technical evaluation criteria; and
- c) obtain the required minimum of 80 percent of the points for each rated criteria and an overall passing mark of 80 points for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 100 points.

**4.2.2** To determine the total evaluated price, the rates submitted in the Annex B: Basis of Payment for the initial period and the two (2) option periods for each category of service will be added to obtain the total evaluated price

Total evaluated price = (B.1.1.1a + B.1.1.1b + B.1.1.1c) + (B.1.1.2a + B.1.1.2b + B.1.1.2c) + (B.1.1.3a + B.1.1.3b + B.1.1.3c)

**4.2.3** Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive bid with the lowest evaluated price per point will be recommended for award of a contract.



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## PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and associated 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 in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

### 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](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 CANADIAN CONTENT CERTIFICATION

SACC Manual Clause A3050T (2014-11-27) Canadian Content Definition.

Solicitation No. - N° de l'invitation  
B8803-160322/A  
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B8803-16-0322

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cx026  
CCC No./N° CCC - FMS No./N° VME

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This procurement is limited to Canadian Services.

The Bidder certifies that:

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

### 5.2.3.2 STATUS AND AVAILABILITY OF RESOURCES

SACC Manual Clause A3005T (2010-08-16) - Status and Availability of Resources

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

### 5.2.3.3 EDUCATION AND EXPERIENCE

SACC Manual Clause A3010T (2010-08-16) - Education and Experience

\_\_\_\_\_  
**SIGNATURE**

\_\_\_\_\_  
**DATE**

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## 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

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex F.
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 three (3) 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.

##### 6.1.2.3 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.

#### **6.1.2.4 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.

#### **6.2.1.1 Supplemental General Conditions**

4007 (2010/08/16) Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

### **6.3 Security Requirement**

**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 award to **March 31, 2019**.

#### **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 two (2) additional twelve (12) month 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:

**Cassandra Andruchow**  
Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Communications Procurement Directorate  
360 Albert St., 12th Floor, #41  
Ottawa, ON K1A 0S5

Telephone: 613-993-7846  
Facsimile: 613-991-5870  
E-mail address: [cassandra.andruchow@pwgsc-tpsgc.gc.ca](mailto:cassandra.andruchow@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 Technical Authority**

The Technical Authority for the Contract is:

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

The Technical Authority named above 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 Technical Authority, however the Technical 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 Procurement Authority**

The Procurement Authority for the Contract is:

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

The Procurement Authority is the representative of the department or agency for whom the Work is being carried out under the Contract. The Procurement Authority is responsible for the implementation of tools and processes required for the administration of the Contract. The Contractor may discuss administrative matters identified in the Contract with the Procurement Authority however the Procurement Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of Work can only be made through a contract amendment issued by the Contracting Authority.

### **6.5.4 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 excluded and Applicable Taxes are extra.

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

### **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 \$120,000.00. Customs duties are excluded 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.

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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

### **6.7.7 Multiple Payments**

SACC Manual Clause H1001C (2008-05-12) Multiple Payments

## **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**

Compliance with the certifications and related documentation provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification, provide the related documentation 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.

### **6.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor**

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The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

### **6.9.3 Canadian Content Certification**

SAAC Manual Clause A3060C (2008-05-12) Canadian Content Certification

### **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), General Conditions - Higher Complexity - Services;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex D, Annex D to Part 5 - Bid Solicitation;
- (g) Annex E, Insurance Requirements;
- (h) the signed Task Authorizations (including all of its annexes, if any);
- (i) 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.

### **6.14 Copyright**

Title to all products resulting from the Work and all materials supplied shall be the property of Canada. The Supplier shall ensure that any articles in its possession shall be stored under suitable conditions (of safety, temperature, humidity, etc.) until shipped, properly identified and packaged. Reproduction of any documents or other data shall not be reproduced without the expressed written permission of the Project Authority.

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## ANNEX "A" STATEMENT OF WORK

### International Experience Canada multi-year marketing and communications plan

#### 1.1 BACKGROUND

International Experience Canada supports Canada's economic and cultural interests by facilitating bilateral, reciprocal agreements with 32 countries to allow travel and work exchange opportunities for young Canadians and foreign nationals aged 18-35. The program gives Canadian youth the opportunity to broaden their perspective of the world and Canada's place in it through international travel and work experience. This experience helps their careers, but it also helps to build a competitive global work force that contributes to Canada economic success.

International Experience Canada (IEC), administered by Citizenship and Immigration Canada (CIC), provides opportunities to Canadian youth aged 18 to 35 to travel, live and work abroad for a period of up to two ( 2 ) years, and reciprocally, for non-Canadian youth to travel, live and work in Canada.

Under the International Experience Canada program (IEC program), participants apply for and can be granted a youth mobility visa and a work permit under one of three sub- categories: Working Holiday; Young Professionals; and International Co-op.

- The Working Holiday allows youth to fund their vacation with temporary work abroad.
- The Young Professionals category allows Canadians to gain professional work experience to better compete in a global economy.
- The International Co-op Internship allows Canadians to acquire valuable overseas work experience related to their field of study.

The IEC program supports CIC's mission through the achievement of the strategic goal, *"Migration of permanent and temporary residents that strengthens Canada's economy"* as specified in the department's *Performance Management Framework*.

#### 2.0 OVERALL OBJECTIVES

The communications strategy firm is must develop an integrated, multi-year (2015-2019), marketing and communications plan to support Citizenship and Immigration Canada's (CIC) IEC program. The goal is to begin implementing the plan as early as February 2015.

The key objective for the IEC is to increase the number of Canadian youth travelling and working abroad in one of the 32 countries with which Canada has a youth mobility agreement.

The marketing and communications plan will guide the CIC in implementing the new mandate of the IEC program to ensure an appropriate approach to marketing and communications activities is in place in order to reach key target audiences with appropriate tactics and in the appropriate time frame. The plan is to be implemented progressively over a period of four (4) years, with an ongoing review to determine if activities outlined in the plan are meeting the objective of increasing Canadian participation. The plan should consider existing key messages developed for IEC as well as new messages when required.

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## 2.1 Specific Objectives

The Contractor must provide a multi-year (2015-2019) integrated marketing and communications plan.

The plan must be focused on key target audiences:

- Canadian youth between the ages of 18-35 years;
- parents;
- secondary and post-secondary Canadian institutions, stakeholders (defined below) and other influencers.

The Contractor must deliver the following:

1. Develop an integrated, multi-year {2015-2019}, global marketing and communications plan that includes traditional media, online, social media, and promotional material as well as in-person events both directed at Canadian youth and trade-professional organizations engaged in youth travel.
2. Identify potential partners and stakeholders within Canada and abroad and specify any opportunities for potential partnering and/or partnership with stakeholders pursuing similar goals as IEC.
3. Define the various segments of Canadian youth who are potential targets, including those: attending secondary and post-secondary institutions; in the labour market, or about to enter the labour market; Aboriginal youth; and new young citizens.
4. Conduct market research related to: Canadian youth; Canadian youth travel and work, and Canadian youth mobility both within Canada and abroad and compare young Canadians' behaviours with young from other partner countries. Define the youth mobility travelling purchase behavior and cycle (dreaming, planning, booking and at destination) for the three (3) sub-categories (Working Holiday; Young Professionals; and International Co-op) and a content marketing strategy to promote IEC's opportunities across all stages of the purchase cycle.

Review the current brand (vision, mission and promises) used by the IEC and make recommendations on whether or not to continue with the brand. The communications strategy firm must provide a minimum of three (3) alternatives to the current brand. The goal of a new or refreshed International Experience Canada brand (IEC brand) is to raise awareness of the program with Canadian audiences.

The brand will be reflected with high visibility in lines of marketing, such as:

- Online.
- Social media.
- Traditional media platforms.
- Promotion at events.
- Engagement meetings and events.
- Direct marketing.

Over the course of the Contract, the Contractor must conduct additional research (timing to be determined in consultation with the Project Authority) to ensure the key partners, stakeholders and youth target audience remain the same and/or to identify new partners and audiences.

The new or revised IEC brand should resonate with target audiences and identify with the program objectives of travelling, living and working abroad. The focus and messaging is meant to communicate the opportunities for Canadians and encourage them to sign up to the program.

### 2.1.1 Program and objectives

The IEC program is very popular with foreign youth, with approximately 68,000 foreign youth coming to Canada annually. Comparatively, there are only approximately 18,000 Canadian youth who go

abroad. This imbalance results in a current 3:1 reciprocity ratio (i.e. for every three [3] foreign youth coming to Canada through IEC, only one [1] Canadian youth goes abroad). It is expected that by implementing promotional/marketing and engagement strategies, the following objectives can be achieved:

- Increase the number of Canadian participants, and close the reciprocity gap to
- 2:1 by 2019;
- Raise awareness of the opportunities available, and the benefits of going abroad, to Canadian youth;
- Capitalize on the impact that first-level influencers may have on target audience.

## 2.2 Target Audiences

Audiences are defined as follows:

a. Primary audience:

- i. Canadian youth between the ages of 18-35.

b. First-level influencers:

- i. Parents;
- ii. Friends
- iii. Current and previous International Experience Canada participants;
- iv. Educational institutions; and
- v. Media and specialized media. .

c. Second-level influencers (ranked by order of importance):

- i. Travel and Work organizations;
- ii. Private sector;
- iii. Ethnic diasporas in Canada and aboriginal communities;
- iv. General public.

## 2.3 Key Messages

- Gain valuable life and work experience through IEC, whether you choose to go for a working holiday, an international professional experience or an international co-op term.
- IEC provides an opportunity to go abroad to travel, live and work in another country for up to two years.
- Visit the IEC website [Canada.ca/IEC-EIC](http://Canada.ca/IEC-EIC) and apply to take advantage of this great opportunity.

## 3.0 SCOPE OF WORK

The Contractor must develop an integrated and innovative multi-year marketing and communications plan to inform target audiences of the IEC program. The plan is to be based upon research undertaken by the Contractor, information provided by CIC, and industry best practices in marketing communications. Due to the target audiences, it is expected that the Contractor will propose innovative methods that go beyond promotional material offered at fairs to engage and influence the audiences.

The Contractor must:

1) Comply with all Government of Canada policies, in particular, those related to communications, design, and IT policy frameworks and toolsets. *These regulations can be found here:*

- Communications Policy of the Government of Canada available for reference at <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316> to ensure that communications across the Government of Canada are well coordinated, effectively managed and responsive to the diverse information needs of the public.

- The Official Languages Act {Sections 11 and 30} available at:  
<http://laws-lois.justice.gc.ca/eng/acts/O-3.01/> to ensure compliance in all products.

- To ensure proper privacy practices are incorporated and respected in the handling of personal information in accordance with *The Privacy Act* available at:

<http://laws-lois.justice.gc.ca/eng/acts/P-21/index.html> .

- All Internet concepts must adhere to the web standards of the Government of Canada, found at the following web address: <http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp>

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<sup>1</sup> To ensure the integrity and efficacy of Government of Canada communications, the Contractor must provide services and produce materials in compliance with the administrative policies of the Government of Canada issued by the Treasury Board of Canada Secretariat

- The Standard on Web Accessibility to ensure conformance with Web Content Accessibility Guidelines (WCAG) 2.0 ([www.w3.org/TR/WCAG20](http://www.w3.org/TR/WCAG20))-

[www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=23601](http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=23601).

2) Undertake the required market research, including but not limited to identification of target audiences as defined in Phase 1 of section 5.0, task 4. The Contractor must identify any additional characteristic of the target audience(s) that must be considered.

3) Review and evaluate the existing brand essence of "International Experience Canada" including the vision, mission and promises, as well as the "look and feel," and program name in order to put forth recommendations to modify or not to modify the existing brand. No public opinion research can be conducted as a part of this contract.

The Contractor may also need to provide secondary research and data analysis on which to base the development of messages and the marketing plan. If other studies are necessary, the Contractor must advise the Project Authority in the first phase (Phase 1) of the Contract, providing a business case, including scope and costing. Should additional research and analysis data be available by the Immigration branch, the Project Authority will advise and share with the Contractor in order to ensure that the messages and marketing plan are still accurate.

4) Develop global (that is, suitable to all markets) messaging, including taglines, for each of the target audiences described in point 11.

5) Develop key messages for each of the target audiences (as referenced in Section 3.3) for Canadians going abroad.

The key messages must target primary audiences and first- and second-level influencers as referenced in Section 3.3.

6) Provide recommendations for a revised brand essence, including the vision, mission and promises, as well as the "look and feel" and name of the current IEC brand. The Contractor must include comments on colours, tone of the communication, and the communication structure used in promotional ads, banners, back walls, promotional brochures, videos, and other communication material.

7) Develop a progressive global marketing/promotional plan, which includes the proposal of effective traditional and electronic channels such as publicity, e-communications (including social media), leveraging IEC events, industry events, partners and stakeholders promotional channels. The marketing plan must take into consideration the different target audiences.

8) Develop an action plan to transform the strategy into action. Recommend key tactics for reaching the target audiences with associated timelines.

9) Identify key partnership opportunities and outline how to integrate those partnerships into the marketing strategies.

10) Develop a global marketing/promotional plan. The global marketing/promotional plan will be over four (4) years and must detail the objectives, strategies and execution that will be undertaken in the various channels of communications (listed in point 7). The plan must include the following:

- a. Marketing and partnerships objectives;
- b. Target audiences;
- c. Key messages;
- d. Strategy to develop partnerships;
- e. Action plan;

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- f. Environmental scan;
  - g. Budget;
  - h. Timing;
  - i. Rationale;
  - j. Deliverables; and
  - k. An evaluation mechanism to evaluate outcomes of the plan.

The global marketing plan must include a differentiated communication stream to promote our Francophone offering. In particular, it should leverage Canada's francophone offering to promote the program in Francophone communities outside Quebec (read more at the following website: <http://www.cic.gc.ca/english/francophone.asp>). The plan must also include an aboriginal and young multicultural communities component.

11) Deliver a final set of integrated recommendations covering four(4) years of tactics as part of the final deliverables. Objectives, strategies, target audiences, indicators of success, risks, resources, a critical path and key deadlines, as well as an outline of evaluation criteria for performance measurement must all be clearly set out in the final recommendations.

12) Assist in the production and implementation of approved brand recommendation and the multi-year marketing plan.

13) Through consultation with the Project Authority, communicate, in person or by teleconference, with identified staff working on the IEC file at National Headquarters in Gatineau, Quebec and in Canadian missions abroad.

#### **4.0 Roles and Responsibilities of Key Personnel**

CIC has determined the following service categories to be requisite for the provision of Marketing and Communication Services in relation to this requirement:

##### **4.1 Account Manager**

- Provide ongoing account management services.
- Document all activities (including activities undertaken in all categories of service) and direct costs that include the level of effort (time and resources) it undertook to deliver the services required by the Project Authority (PA). Specifically, the Account Manager will:
  - Adhere to all procedures and ensure that correct documentation is in place;
  - Manage, on a day to day basis, all resources working on the development of materials;
  - Work as a cohesive team in order to deliver good value for dollar to the GoC on a timely basis;
  - Attend client briefings and meetings; and
  - Supervise and report on any work produced by approved subcontractors.

##### **4.2 Senior Strategist**

- Gathering data to develop well-informed and effective strategic plans
- Researching clients to understand them and their objectives
- Producing inventive ideas with other members of the creative team
- Writing clear briefs that inspire team members to create exceptional work
- Analysing clients to uncover opportunities to stimulate growth
- Reviews, analyzes and evaluates the following, relative to the client's needs and objectives: media output, creative output, research reports and client data.
- Defining project scope, estimate and writing proposals, works with producer in the creation of project specifications and time plans.

- 
- Understand marketing objectives, challenges and opportunities of target and industry

#### 4.3 Creative Director

- Ensure production supervision and quality control of materials, including work that is outsourced.
- Take into consideration creative content constraints.
- Provide production management services for materials, such as, but not limited to:
- Social media development (including social networks);
- Provide production management services, such as but not limited to:
- Accurately estimating costs;
- Negotiating with production sub-contractors;
- Following required tendering processes for sub-contracting;
- Obtaining legal clearance for intellectual property;
- Negotiating copyright on behalf of the Crown;
- Obtaining and documenting talent releases.

#### 5.0 TASKS AND DELIVERABLES

The Contractor may be required on an as and when requested basis, to provide marketing and communication services.

Refer to section 3.0 Scope of Work for specific details of the Contractor's responsibilities.

##### i.) The initial task authorizations will include:

The Contractor must perform the required tasks and provide the deliverables in accordance with each phase. Specific detail for each phase will be provided if and when the Task Authorizations are issued for the work specified below.

#### **Phase 1: Kick-off and Document Review**

##### **Task 1: Preliminary meeting**

Within one (1) week of the contract award, the Project Authority will meet in person in Ottawa or by teleconference with the Contractor to confirm expectations, gather documents for review and prepare a detailed work plan. A list of identified IEC staff will be provided to the Contractor, in order for in person or teleconference interviews to be scheduled for the Contractor to gather insight/background/corporate knowledge on the Initiative.

Deliverable(s) #1: Work Plan including Gantt chart with estimated timelines.

##### **Task 2: Document review**

Review documents provided by the Project Authority in order to understand:

- Government of Canada policies, in particular, those related to communications, advertising, public opinion surveys and IT policy frameworks and toolsets (see list in 4.0.1). Neither Public Opinion and Research activities nor Advertising services are permitted as a part of the services to be provided under this contract.

Documents for review: Engagement strategy

Engagement plans

Promotion strategy/information officers

CIC commissioned Communication framework

CIC commissioned report on fairs List of all promotional items Presentations (in-house)



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Reports prepared for the Program

- Graphic files
- Canada Down Under
- Youtube clips
- Social media in-house framework?
- Overview of IEC's past marketing
- Youth Travel Movement (Canadian Tourism Commission's vision for Canada's 150th)

*This could be you* publicity campaign  
Ipsos Reid survey

Deliverable(s) #2: Summary report of key findings.

**Task 3: One-on-one information gathering on past experiences and vision**

Meet (teleconference or in person) with selected IEC staff at NHQ to gather relevant information. Five meetings or teleconferences to discuss with different program managers to obtain intelligence on the program.

Deliverable(s) #3: Summary report of key findings gathered from the meeting with IEC staff.

**Task 4: Market Research**

Collect data which includes primary and secondary sources such as customer surveys, focus groups, interview of key stakeholders and literature review.

Perform market research including, but not limited to:

- A) **Target audience identification/Market segmentation:** Identify the various primary and secondary audiences that will be targeted by the marketing strategy
- B) **Youth mobility market research:** Research and analysis on the youth travel industry and positioning of IEC
- Analysis of market size in Canada and abroad according to the different target audiences identified.
  - Analysis of key market trends and competitors (including travel and work service providers, "local options", studying abroad, volunteering, as well as foreign governments youth mobility programs).
  - Analysis of IEC's positioning within the travel industry, youth travel industry, working and travel experiences (including volunteering).
  - SWOT Analysis.
- C) **Research Analysis:** Research and analysis on the various target audiences identified
- Research and analysis of customer profile for each target audience identified
  - Research and analysis from available sources on customer needs, preferences, expectations and trends for each target audience identified
  - Analysis of hurdles and accessibility of primary target audiences in obtaining work permits in foreign partner countries.

Deliverable(s) #4: Report on findings of the market research with recommendations for future focus on audiences

**Phase 2: Brand Essence Review**

Task 1: Review and assess the existing brand essence of IEC, including the vision, mission and promises, as well as the "look and feel" and Initiative's name. Take into consideration "Destination Canada" when developing brand options and how CIC might capitalize on Destination Canada's

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existing brand. View Destination Canada video:

<http://www.cic.gc.ca/english/department/media/multimedia/video/destination/destination.asp>

Deliverable(s) #1: Report on the review of brand essence and recommendations for brand

Task 2: Development of Global Brand Messaging.

Deliverable(s) #2: Approved global brand messaging

Task 3: Development of key messages tailored to various target audiences.

Deliverable(s) #3: Key messages for all target audiences

Task 4: Provide recommendations for the IEC brand, "look and feel" and name.

Deliverable(s) #5: Recommendations and rationale for recommendations on the IEC brand.

### **Phase 3: Development of a progressive multi-year marketing plan**

Task 1: Recommendation of a progressive multi-year marketing plan

Deliverable(s) #1: Progressive multi-year marketing plan

### **Phase 4: Implementation of approved recommendation for brand review and multi-year marketing plan**

#### **Task 1: Assist in the implementation of the approved recommendation for the brand review**

Deliverable(s) #1: Assistance with brand review with creative agency. Offer recommendations and options if new branding is required.

#### **Task 2: Assist in the implementation of a progressive multi-year marketing plan**

Deliverable(s) #2: Deliver detailed action plan with specific milestones in order to deliver the marketing plan.

#### **Task 3: Writing of the final report**

Deliverable(s) #3:

Provide a set of integrated recommendations covering 4 years of actions and recommended products as part of the final deliverables. Objectives, strategies, target audience, indicators of success, risks, tactical plan, resources, a critical path and key deadlines as well as an outline of evaluation criteria for performance measurement must all be clearly set out in the final report.

## **6.0 ROLE OF THE PROJECT AUTHORITY**

The Project Authority and the CIC- IEC program will ensure coherence by keeping draft recommendations focused on marketing tactics that are practical, affordable, and within the Department's mandate. In order to increase buy in with CIC's many stakeholders, the draft recommendations will be used to involve and share insights with partners, as appropriate.

The Contractor must share its methodology with the Project Authority at pre-identified intervals. In return, the Contractor will receive feedback, input and suggestions, from the CIC Project Authority which are to be incorporated into the final product.

A weekly communication, in person or by teleconference, will be required with the Project Authority.

## **7.0 PROJECT START DATE**

The project will commence immediately following contract award. Final delivery of the integrated marketing plan is required six (6) months after contract award. Specific deliverables will be staggered throughout the contract period.

## **8.0 REPORTING**

For the entire duration of the Contract:

- a) The Contractor (and team as required) must be available for weekly teleconferences with the Project Authority and for any other in-person or telephone meetings that may be required by the Project Authority. Notice for these meetings will be provided in advance as much as possible.
- b) The Contractor must submit monthly progress reports by email, briefly describing the status of the project, any difficulties encountered and solutions proposed. These progress reports can be submitted in point form and formal reporting is not required. Depending on the type of report outlined in the Deliverables section, they must be provided in either Word, PowerPoint and Excel formats.

## **9.0 WORK LOCATION AND TRAVEL**

The work must be performed at the Contractor's own place of business. However, the Contractor will be expected to attend meetings conducted in person or by teleconference or videoconference as authorized by the Project Authority. First kick-off meeting to last half a day. Subsequent meetings (4) to last 90 minutes during the first year of the contract.

## **10.0 LANGUAGE OF THE WORK**

The Contractor must be able to function effectively verbally and in writing in the English language. Deliverables must be provided in English only.

## **11.0 CONTRACT OPTION**

This contract is designed with two (2) option years. In the event that the mandate/objectives of the program change or that new market research has been completed/made available, the Contractor must review the approved multi-year marketing plan, and make recommendations of any changes to the Project Authority to ensure that plan is still relevant.

**ANNEX "B"  
 BASIS OF PAYMENT**

**B.1 FIRM HOURLY RATES**

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.

The firm, all-inclusive hourly rates includes all required personnel, equipment operators, equipment, materials and applicable charges in the hourly rates submitted as no other fees or hourly rates for services will be payable above these rates\*\*.

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

\*\* The firm, all-inclusive hourly rates do not include the cost of travel, equipment rental or other direct and sub-contracted costs as specified in B.2, and in B.3 and B.4 of this Annex B Basis of Payment.

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 three (3) categories of services in table B.1.1.

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 B.1.1 - Category of Service	HOURLY RATE	HOURLY RATE	HOURLY RATE	TOTAL PRICE (a + b + c)
	a) INITIAL CONTRACT PERIOD	b) OPTION PERIOD 1	c) OPTION PERIOD 2	
B.1.1.1 Account Manager	\$ _____	\$ _____	\$ _____	\$ _____
B.1.1.2 Senior Strategist	\$ _____	\$ _____	\$ _____	\$ _____
B.1.1.3 Creative Director	\$ _____	\$ _____	\$ _____	\$ _____

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

<b>TOTAL EVALUATED PRICE</b> (Total Price for B.1.1.1 + Total Price for B.1.1.2 + Total Price for B.1.1.3)	<b>\$ _____</b>
--	-----------------

## **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.3 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.4 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.

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

**ANNEX "C"**  
**EVALUATION GRID**

<b>EVALUATION SUMMARY</b>		
<b>1.1 MANDATORY REQUIREMENTS</b>		
M1. Key Personnel Identification (Curriculum Vitae [CV])	<input type="checkbox"/> MET	<input type="checkbox"/> NOT MET
M2. Experience of the Firm	<input type="checkbox"/> MET	<input type="checkbox"/> NOT MET
M3. Financial Offer	<input type="checkbox"/> MET	<input type="checkbox"/> NOT MET
<b>1.2 RATED REQUIREMENT</b>	<b>MINIMUM POINTS</b>	<b>SCORE ACHIEVED</b>
R1. Approach and Methodology	48 points	___ / points
R2. Project Samples	32 points	___ / points
<b>OVERALL TOTAL</b>	<b>80 points</b>	<b>___ / points</b>

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

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**EVALUATION TEAM SIGNATURES:**

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

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

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

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

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

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

**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
<b>M.1. Key Personnel Identification (Curriculum Vitae [CV])</b>		
<p>The Bidder must clearly identify the proposed key personnel for the following roles:</p> <ul style="list-style-type: none"> <li>• Account Manager            Minimum Required Qualifications:           <ul style="list-style-type: none"> <li>• Three (3) years experience in Account Management and a post-secondary degree or diploma in a related field; or</li> <li>• Five (5) years experience in Account Management.</li> </ul> </li> <li>• Senior Strategist            Minimum Required Qualifications:           <ul style="list-style-type: none"> <li>• Two (2) years experience in developing Marketing and Communications plan as well as post-secondary degree or diploma in marketing or Communications or a related field; or</li> <li>• Four (4) years experience in developing Marketing strategies</li> </ul> </li> <li>• Creative Director            Minimum Required Qualifications:           <ul style="list-style-type: none"> <li>• Three (3) years experience in Creative Direction for marketing campaigns including social media, and a post-secondary degree or diploma in a related field; or</li> </ul> </li> </ul>		



<ul style="list-style-type: none"> <li>• Five (5) years experience in Creative Direction</li> </ul> <p>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 role, provided that the individual meets the minimum required qualification for each role.</p> <p>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.</p> <p>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.</p> <p>Name of proposed Personnel:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2"></th> <th colspan="2" style="text-align: center;"><u>Resume</u></th> <th colspan="2" style="text-align: center;"><u>Minimum criteria met</u></th> </tr> <tr> <th style="text-align: center;">Yes</th> <th style="text-align: center;">No</th> <th style="text-align: center;">Yes</th> <th style="text-align: center;">No</th> </tr> </thead> <tbody> <tr> <td>Account Manager _____</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Senior Strategist; _____</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Creative Director _____</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>		<u>Resume</u>		<u>Minimum criteria met</u>		Yes	No	Yes	No	Account Manager _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Senior Strategist; _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Creative Director _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
		<u>Resume</u>		<u>Minimum criteria met</u>																						
	Yes	No	Yes	No																						
Account Manager _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																						
Senior Strategist; _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																						
Creative Director _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																						
<b>Comments:</b>																										

Evaluation Criteria	Met	Not met
<b>M.2. Experience of the Firm</b>		
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 a marketing and communications plan 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.

A minimum of one (1) of the two (2) described projects must include or must have included the development of an integrated marketing and communication social media campaign.

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

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

- Developing a marketing strategy that includes:
  - Original creative for marketing purposes.
  - Analysing and recommending digital engagement to meet the client requirements;
  - Developing key partnerships to expand the reach of the marketing strategy
- Developing tracking and evaluation mechanisms

The Bidder **MUST** provide all the following information for each of the two (2) project samples 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;

**M 2.2** 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 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:**

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME


Evaluation Criteria	Met	Not met
<b>M.3. Financial Proposal</b>		
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.		
<b>Comments:</b>		

**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.**

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

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## **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, and R.2) 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, and R.2) 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 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 Citizenship and Immigration’s overall communication objectives for the target audiences and the Bidder’s proposed solutions.

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

Points Allocated for R1.1: _____ / 30
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**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	<ul style="list-style-type: none"> <li>· Information required was not provided</li> <li>· Few elements present</li> <li>· Not all elements are described or are poorly described</li> <li>· Does not provide details to assess how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>· Does not provide details to describe the tools and techniques that will be used to plan, organize, direct, and control the project.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>· Does not identify any interaction between the Bidder and the Project Authority.</li> </ul>
0.8	Good	<ul style="list-style-type: none"> <li>· Most elements present</li> <li>· Most elements are well described</li> <li>· Details provided lead to an understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved.</li> <li>· Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project.</li> <li>· Details lead to an understanding of the interaction between the Bidder and the Project Authority.</li> </ul>
0.9	Very Good	<ul style="list-style-type: none"> <li>· All elements present</li> <li>· Most elements are well described</li> <li>· Details lead to a good understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved.</li> <li>· Details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project.</li> <li>· Substantial details lead to a good understanding of the interaction between the Bidder and the Project Authority.</li> </ul>

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

1	Excellent	<ul style="list-style-type: none"><li>· All elements present</li><li>· All elements are well described</li><li>· Substantial details lead to a complete and thorough understanding of how the Bidder proposes to ensure that performance, quality, and scheduled goals are achieved.</li><li>· Clear details provided to describe the tools and techniques that will be used to plan, organize, direct, and control the project.</li><li>· 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.</li></ul>
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Points Allocated for R1.2: _____/30
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**Total points allocated for the Rated Criteria R.1: \_\_\_\_\_ / 60 points**

**R.2 Project Samples (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

0	Unsatisfactory	<ul style="list-style-type: none"> <li>· Information required was not provided</li> <li>· Few elements present</li> <li>· Not all elements presented are described or are poorly described</li> </ul> <p>OR</p> <p>Details do not provide evaluators with an understanding of the objectives of the deliverable.</p> <p>OR</p> <p>Details do not provide evaluators with an understanding of how the deliverable was used to meet the project objectives</p> <p>OR</p> <ul style="list-style-type: none"> <li>· The Sample of the deliverable does not demonstrate appropriateness for the stated target audience</li> </ul>
0.8	Good	<ul style="list-style-type: none"> <li>· Most elements present</li> <li>· Most elements are well described</li> <li>· Details provide evaluators with an understanding of the objectives of the deliverable, and how the deliverable was used to meet the project objectives.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>· The Sample of the deliverable demonstrates appropriateness for the stated target audience</li> </ul>
0.9	Very Good	<ul style="list-style-type: none"> <li>· All elements present</li> <li>· Most elements are well described</li> <li>· Details provide evaluators with a good understanding of the objectives of the deliverable, and how the deliverable was used to meet the project objectives.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>· The Sample of the deliverable demonstrates appropriateness for the stated target audience</li> </ul>
1	Excellent	<ul style="list-style-type: none"> <li>· All elements present</li> <li>· All elements are well described</li> </ul>



Solicitation No. - N° de l'invitation  
 B8803-160322/A  
 Client Ref. No. - N° de réf. du client  
 B8803-16-0322

Amd. No. - N° de la modif.  
 File No. - N° du dossier  
 cx026B8803-160322

Buyer ID - Id de l'acheteur  
 cx026  
 CCC No./N° CCC - FMS No./N° VME

		<ul style="list-style-type: none"> <li>· Substantial details provide evaluators with a clear understanding of the objectives of the deliverable, and how the deliverable was used to meet the project objectives.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>· The Sample of the deliverable demonstrates appropriateness for the stated target audience</li> </ul>
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.2: \_\_\_\_\_ / 40 points**

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

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<b>SUMMARY OF POINTS AWARDED TO BIDDER</b>			
<b>Rated Criteria</b>	<b>Maximum Points</b>	<b>Minimum Points</b>	<b>Points Awarded to Bidders</b>
<b>R.1 APPROACH AND METHODOLOGY</b>			
R.1.1 Understanding of the Requirement	30	24	
R.1.2 Project Management Approach	30	24	
<b>TOTAL</b>			
<b>R.2 PROJECT SAMPLES</b>			
R.2 Project Samples	40	32	
<b>TOTAL</b>			
<b>OVERALL TOTAL</b>	100	80	

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**ANNEX "D" to PART 5 - BID SOLICITATION**

**DECLARATION OF CONVICTED OFFENCES**

**A DECLARATION FORM IS ONLY REQUIRED WHEN A BIDDER OR ITS AFFILIATE IS UNABLE TO CERTIFY THAT THEY DO NOT HAVE A CONVICTION FOR LISTED OFFENCES.**

2003 Standard Instructions - Goods or Services - Competitive Requirements

For further information on the Standard Instructions - Goods or Services - Competitive Requirements visit the website:

<HTTPS://BUYANDSELL.GC.CA/POLICY-AND-GUIDELINES/STANDARD-ACQUISITION-CLAUSES-AND-CONDITIONS-MANUAL/1/2003/20>

01 (2015-07-03) Integrity Provisions - Bid  
10. Declaration of Convicted Offences

Where a Bidder or its Affiliate is unable to certify that it has not been convicted of any of the offences referenced under the Canadian Offences Resulting in Legal Incapacity, the Canadian Offences and the Foreign Offences subsections, the Bidder must provide with its bid the completed [Declaration Form](#), to be given further consideration in the procurement process.

Refer to: 2003 Standard Instructions - Goods or Services - Competitive Requirements  
01 (2015-07-03) Integrity Provisions - Bid

Subsections:

6. Canadian Offences Resulting in Legal Incapacity
7. Canadian Offences
8. Foreign Offences

**If applicable:**

- Please complete the declaration form and put in a **sealed envelope labeled Protected B** to the attention of Integrity, Departmental Oversight Branch, PWGSC, 11 Laurier Street, Place du Portage, Phase III, Tower A, 10A1 – room 108, Gatineau (Québec) Canada, K1A 0S5
- Include the sealed envelope with your bid submission.



## Declaration Form

This declaration form must be submitted as part of the [bidding process](#).

- Please complete the declaration form and put in a **sealed envelope labelled protected** to the attention of Integrity, Departmental Oversight Branch, PWGSC.
- Include the sealed envelope with your bid submission.

<b>Complete Legal Name of Company:</b>	
<b>Company's address:</b>	
<b>Company's PBN number:</b>	
<b>Bid number:</b>	
<b>Date of the bid: (YY-MM-DD)</b>	

Have you ever, as the bidder, your affiliates or as one of your directors, been convicted or have pleaded guilty of an offence in Canada or similar offence elsewhere under any of the following provisions <sup>1</sup> :	Yes	No	Comments
<b>Financial Administration Act</b> 80(1) d): False entry, certificate or return 80(2): Fraud against Her Majesty 154.01: Fraud against Her Majesty  <b>Criminal Code</b> 121: Frauds on the government and contractor subscribing to election fund 124: Selling or Purchasing Office 380: Fraud - committed against Her Majesty 418: Selling defective stores to Her Majesty	<input type="checkbox"/>	<input type="checkbox"/>	
<b>In the last 3 years, have you, as the bidder, your affiliates or one of your directors, been convicted or have pleaded guilty of an offence in Canada or elsewhere under any of the following provisions<sup>1</sup>:</b>			
<b>Criminal Code</b> 119: Bribery of judicial officers,... 120: Bribery of officers 346: Extortion 366 to 368: Forgery and other offences resembling forgery 382: Fraudulent manipulation of stock exchange transactions 382.1: Prohibited insider trading 397: Falsification of books and documents 422: Criminal breach of Contract 426: Secret commissions 462.31: Laundering proceeds of crime 467.11 to 467.13: Participation in activities of criminal organization  <b>Competition Act</b> 45: Conspiracies, agreements or arrangements between competitors 46: Foreign directives 47: Bid rigging 49: Agreements or arrangements of federal financial institutions	<input type="checkbox"/>	<input type="checkbox"/>	

<sup>1</sup> for which no pardon or equivalent has been received

Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

## Declaration Form

52: False or misleading representation 53: Deceptive notice of winning a prize			
	<b>Yes</b>	<b>No</b>	<b>Comments</b>
<b>Corruption of Foreign Public Officials Act</b> 3: Bribing a foreign public official 4: Accounting 5: Offence committed outside Canada	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Controlled Drugs and Substance Act</b> 5: Trafficking in substance 6: Importing and exporting 7: Production of substance	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Other Acts</b> 239: False or deceptive statements of the Income Tax Act 327: False or deceptive statements of the Excise Tax Act	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Additional Comment</b>

I, (name) \_\_\_\_\_, (position) \_\_\_\_\_, of (company name – bidder) \_\_\_\_\_ authorise PWGSC to collect and use the information provided, in addition to any other information that may be required to make a determination of ineligibility and to publicly disseminate the results.

I, (name) \_\_\_\_\_, (position) \_\_\_\_\_, of (company name – bidder) \_\_\_\_\_ certify that the information provided in this form is, to the best of my knowledge, true and complete. Moreover, I am aware that any erroneous or missing information could result in the cancellation of my bid as well as a determination of ineligibility/suspension.

We appreciate your interest in doing business with the Government of Canada and your understanding on the additional steps that we need to take to protect the integrity of PWGSC's procurement process.

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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.

Solicitation No. - N° de l'invitation

B8803-160322/A

Client Ref. No. - N° de réf. du client

B8803-16-0322

Amd. No. - N° de la modif.

File No. - N° du dossier

cx026B8803-160322

Buyer ID - Id de l'acheteur

cx026

CCC No./N° CCC - FMS No./N° VME

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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.

Solicitation No. - N° de l'invitation  
 B8803-160322/A  
 Client Ref. No. - N° de réf. du client  
 B8803-16-0322

Amd. No. - N° de la modif.  
 File No. - N° du dossier  
 cx026B8803-160322

Buyer ID - Id de l'acheteur  
 cx026  
 CCC No./N° CCC - FMS No./N° VME

## ANNEX "F" Task Authorization Form



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

Annex  
 Annexe

<b>Task Authorization</b> <b>Autorisation de tâche</b>		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) \$	
<p>Security Requirements: This task includes security requirements          Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité</p> <p><input type="checkbox"/> No - Non    <input type="checkbox"/> 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</p> <p style="text-align: center;">▶</p>		
<b>For Revision only - Aux fins de révision seulement</b>		
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 \$
<p><b>Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.</b>  <b>Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.</b></p>		
<b>1. Required Work: - Travaux requis :</b>		
A. Task Description of the Work required - Description de tâche des travaux requis		See Attached - Ci-joint <input type="checkbox"/>
B. Basis of Payment - Base de paiement		See Attached - Ci-joint <input type="checkbox"/>
C. Cost of Task - Coût de la tâche		See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement		See Attached - Ci-joint <input type="checkbox"/>

PWGSC - TPSGC 572 (2014-04)



Solicitation No. - N° de l'invitation  
B8803-160322/A  
Client Ref. No. - N° de réf. du client  
B8803-16-0322

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cx026B8803-160322

Buyer ID - Id de l'acheteur  
cx026  
CCC No./N° CCC - FMS No./N° VME

Annex  
Annexe \_\_\_\_\_

Contract Number - Numéro du contrat
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**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.

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.

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.

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