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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1.1.1 There is no security requirement applicable to this solicitation.

1.2 Statement of Work

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

1.3 Office of the Procurement Ombudsman (OPO)

1.3.1 The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by email at boa-opo@boa-opo.gc.ca. You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca

1.4 Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

- 2.1.1 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) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.
- 2.1.2 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.
- 2.1.3 The [2003](#) (2015-07-03), Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

- 2.2.1 Bids must be submitted only to the Office of the Secretary to the Governor General (OSGG) by the date, time and place indicated on page 1 of the bid solicitation.
- 2.2.2 Due to the nature of the bid solicitation, bids transmitted by facsimile to OSGG will not be accepted.

2.3 Former Public Servant

- 2.3.1 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.

2.3.2 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.

2.3.3 Former Public Servant in Receipt of a Pension

2.3.3.1 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.

2.3.3.2 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](#).

2.3.4 Work Force Adjustment Directive

2.3.4.1 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.



2.3.4.2 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.

2.3.4.3 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.

2.4 Enquiries - Bid Solicitation

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

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

2.5 Applicable Laws

2.5.1 Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in [Ontario](#).

2.5.2 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 Improvement of Requirement During Solicitation Period

2.6.1 Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least seven (7) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.



2.7 Basis for Canada's Ownership of Intellectual Property

2.7.1 The Office to the Secretary to the Governor General (OSGG) 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:

(6.4.1) the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid (one (1) electronic copy, PDF format attached to an email)

Section II: Financial Bid (one (1) electronic copy, PDF format attached to an email)

Section III: Certifications (one (1) electronic copy, PDF format attached to an email)

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

3.1.3 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, and
- c) use page numbering on the bottom right of each page of the proposal.

Section I: Technical Bid

In their technical bid, bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Bid

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.2 Technical Evaluation

- 4.2.1 Bidders are advised to address each requirement in sufficient depth to permit a complete analysis and assessment by the evaluation team. Failure to provide sufficient detail in any criterion could result in a proposal being considered as NON-COMPLIANT. Each mandatory criterion should be addressed separately.
- 4.2.2 The Bidder **must** submit a signed bid. In the event of a bid submitted by a contractual joint venture, the bid must either be signed by all members of the joint venture or a statement must be provided to the effect that the signatory represents all parties of the joint venture.

4.3 Mandatory Technical Criteria

- 4.3.1 The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.
- 4.3.2 Mandatory requirements are evaluated on a simple pass or fail basis. Failure by a Bidder to meet any one of the mandatory requirements will render the Bidder's proposal **non-responsive and will not be given further consideration**. The treatment of mandatory requirements in any procurement process is absolute. Each mandatory technical criterion should be addressed separately.

| Mandatory Technical Criteria (MT) | | | |
|--|--|--|------------------------------------|
| For the purpose of the mandatory technical criteria specified below, the experience of the Bidder* will be considered. | | | |
| <i>"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors</i> | | | |
| Item No. | Mandatory Technical Criterion | Bid Preparation Instructions | MET / NOT MET |
| MT1 | The Bidder must demonstrate a minimum of three (3) projects within the last seven (7) years, in developing and implementing national bilingual Outreach and Branding Strategies. | The Bidders must provide a minimum of three (3) projects references. Each reference must contain the following information: a) the name of the client organization; | <i>Cross reference to Proposal</i> |



| | | | |
|------------|---|--|------------------------------------|
| | | b) the Project Authority, name, title, phone number; c) brief description of the project; d) the start and end date of the work; e) the positive impact of the project. | |
| MT2 | The Bidder must demonstrate their experience in developing an Outreach and Brand Strategies, creative concepts and the production and implementation of the concepts which resulted in positive impact. | The Bidder must demonstrate how previous experience relates to the current project scope. | <i>Cross reference to Proposal</i> |

4.4 Point Rated Technical Criteria

4.4.1 Each Technical Bid that meets all the Mandatory Requirements specified above will be evaluated and scored in accordance with the following point-rated evaluation criteria table. Each point rated technical criterion should be addressed separately.

| RATING SCHEME 1 | |
|-----------------|---|
| 0% | Information provided does not address the criteria. Bidder receives 0% for the available points for this element. |
| 10% | Information provided demonstrates a minimal understanding that is relevant to the stated criteria. Bidder receives 10% of the available points for this element. |
| 30% | Information provided demonstrates some understanding that is relevant to the stated criteria but does not demonstrate a full range of understanding for all elements of the rated criteria. Bidder receives 30% of the available points for this element. |
| 50% | Information provided demonstrates understanding for most but not all of the elements of the rated criteria. Bidder receives 50% of the available points for this element. |
| 70% | Information provided demonstrates understanding that is relevant to all of the elements of the rated criteria meeting the established minimum. Bidder receives 70% of the available points for this element. |
| 85% | Information provided clearly demonstrates a full understanding of all of the elements of the rated criteria. Bidder receives 85% of the available points for this element. |
| 100% | Rated criteria is dealt with in depth, information provided demonstrates a full range of in-depth understanding of all of the elements of the rate criteria. Bidder receives 100% of the available points for this element. |

Point Rated Technical Criteria (RT)

For the purpose of the point rated technical criteria specified below the experience of the Bidder* will be considered.

"Bidder" means the person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It does not include the parent,



| <i>subsidiaries or other affiliates of the Bidder, or its subcontractors.</i> | | | |
|---|--|--|--------------------|
| Item No. | Point Rated Technical Criterion | Bid Preparation Instructions | Weighting (Points) |
| RT1 | The Bidder should demonstrate an understanding of the requirement defined in Annex A, Statement of Work. | In order to demonstrate its understanding of the requirement, the Bidder should present: | |
| | | a) their understanding of the mandate and the challenges to be addressed; | 15 |
| | | b) the unique value they are offering; | 15 |
| | | c) a summary of their proposed approach to the Outreach and Brand Strategy. | 10 |
| RT2 | The Bidder should provide a high level project work plan including level of effort and capacity to achieve delivery of timeline. | The high level project work plan should include: | |
| | | a) A work schedule for the proposed approach broken down in project phases. | 30 |
| | | b) A preliminary budget breakdown for each project phase. | 10 |
| | | c) Propose key performance indicators for the Branding and Outreach Strategy | 10 |
| | | For each project phase (as described in 8.0 of Annex A, Statement of Work) the following information should be provided: | |
| | | a) level of effort broken down by phase, and by resource type. | 10 |
| Total of points | | | 100 |
| Minimum points | | | 70 |

4.5 Financial Evaluation

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

4.5.2 The maximum funding available for the Contract resulting from the bid solicitation is \$140,000.00 (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

4.6 Basis of Selection

4.6.1 Basis of Selection - Highest Rated Within Budget



4.6.1.1 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 70% percent overall of the points for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 100 points.

4.6.1.2 Bids not meeting (a) or (b) or (c) will be declared non responsive. The responsive bid with the highest number of points will be recommended for award of a contract, provided that the total evaluated price does not exceed the budget available for this requirement.

4.6.1.3 The maximum funding available for the Contract resulting from the bid solicitation is \$140,000.00 (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.



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 Precedent to Contract Award

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

5.2 Integrity Provisions - Associated Information

5.2.1 By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions [2003](#). The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.3 Additional Certifications Precedent to Contract Award

5.3.1 Status and Availability of Resources

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

5.3.1.2 If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to



Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

5.3.2 Education and Experience

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



PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

6.1.1 There is no security requirement applicable to this Contract.

6.2 Statement of Work

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

6.3 Standard Clauses and Conditions

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

6.3.2 General Conditions

6.3.2 [2035](#) (2015-07-03), General Conditions - Higher Complexity - Services apply to and form part of the Contract.

6.3.3 Supplemental General Conditions

6.3.3.1 The following SACC manual Clauses are incorporated by reference and form part of this Contract:

| ID | Date | Titre |
|------------------------|------------|--|
| A9117C | 2007-11-30 | T1204 – Direct Request by Customer Department |
| G1005C | 2008-05-12 | Insurance |
| C0100C | 2010-01-11 | Discretionary Audit – Commercial Goods and/or Services |
| 4007 | 2010-08-16 | Canada to Own Intellectual Property Rights in Foreground Information |
| B2008C | 2014-06-26 | Government of Canada Web Standards |

6.4 Term of Contract

6.4.1 Period of the Contract

6.4.1.1 The Work is to be performed during the period of _____ (*fill in start date of the work*) to _____ (*fill in end date of the work*).



6.4.2 Option to Extend the Contract

6.4.2.1 The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to _____ additional _____ year period(s) 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.

6.4.2.2 Canada may exercise this option at any time by sending a written notice to the Contractor at least _____ 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

6.5.1.1 The Contracting Authority for the Contract is:

Name: Mélanie Vézina
Title: Manager
Organization: Office of the Secretary to the Governor General
Materiel Management
Address: 1 Sussex Drive
Ottawa, Ontario K1A 0A1

Telephone: 613-991-9351
E-mail: melanie.vezina@gg.ca

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

6.5.2 Project Authority

6.5.2.1 The Project Authority for the Contract is:

The Project Authority will be identified at contract award

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

6.5.3 Technical Authority

6.5.3.1 The Technical Authority for the Contract is:

The Technical Authority will be identified at contract award.



6.5.3.2 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.

6.5.4 Contractor's Representative

To be completed by the Bidder

Name:

Title:

Organization:

Address:

Telephone:

E-mail:

6.6 Proactive Disclosure of Contracts with Former Public Servants

Note to Bidder: If not applicable, this clause will be removed at contract award.

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

6.7 Payment

6.7.1 Basis of Payment

6.7.1.1 The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of \$_____ (*insert the amount at contract award*). Applicable Taxes are extra.

6.7.2 Limitation of Expenditure

6.7.2.1 Canada's total liability to the Contractor under the Contract must not exceed \$ _____ and Applicable Taxes are extra.

6.7.2.2 No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

a) when it is 75 percent committed, or



- b) four (4) months before the contract expiry date, or
- c) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

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

6.7.3 Terms of Payment – Milestone Payments

6.7.3.1 Canada will make milestone payments in accordance with the Schedule of Milestones in Annex "C" and the payment provisions of the Contract if:

- a) an accurate and complete invoice and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b) all such documents have been verified by Canada;
- c) all work associated with the milestone and, as applicable, any deliverable required has been completed and accepted by Canada.

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 completed.

6.8.2 Each invoice must be supported by:

- a) a copy of time sheets to support the time claimed;
- b) a copy of the release document and any other documents as specified in the Contract;
- c) a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- d) a copy of the monthly progress report.

6.8.3 Invoices must be distributed as follows:

- a) The original must be forwarded to the address shown on page 1 of the Contract (OSGGContracts@gg.ca) for certification and payment.

6.9 Certifications

6.9.1 Compliance

6.9.1.1 The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor



in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

6.10 Applicable Laws

6.10.1 The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____. (*Insert the name of the province or territory as specified by the Bidder in its bid, if applicable*)

6.11 Priority of Documents

6.11.1 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 _____ (*insert number, date and title*);
- c) the general conditions _____ (*insert number, date and title*);
- d) Annex X, Statement of Work;
- e) the Contractor's bid dated _____ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award: “, as clarified on _____” or “, as amended on _____” and insert date(s) of clarification(s) or amendment(s)*)

6.12 Insurance Requirements

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

6.13 Dispute Resolution

6.13.1 The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will, on request, and consent of the parties, to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-7345169 or by e-mail at opo-boa@opa-boa.gc.ca.

6.14 Contract administration

6.14.1 The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by [the supplier or the contractor or the name of the entity awarded this contract] respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman*



Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are **not** in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at opo-boa@opa-boa.gc.ca.



ANNEX A

STATEMENT OF WORK

1.0 GENERAL

- 1.1 The purpose of this Statement of Work (SOW) is to define the scope and the deliverables that apply to the work and responsibilities of a creative agency who will develop a comprehensive Brand Strategy and Outreach Plan for the promotion of the civil division of the Meritorious Service Decorations (MSD). This honours program is managed by the Chancellery of Honours, a division of the Office of the Secretary to the Governor General (OSGG or The Office).

2.0 SCOPE

2.1 Goal

- 2.1.1 The MSD civil division program seeks to recognize individuals who have accomplished a remarkable deed or specific activity that brought honour to their community or to Canada. This decoration is for civilians who made a contribution over a limited period of time in any field of endeavour including; research, advocacy, community support, humanitarian activity, public service and other notable achievements in a broad range of activities.

2.2 Objectives

- 2.2.1 To **brand** the MSD civil division program by creating a unique identity and creative material that inspires Canadians by making it relevant to them on a personal level.
- 2.2.2 To create an outreach strategy that will **raise awareness** and improve understanding of the MSD civilian program
- 2.2.3 To develop an outreach plan that will target potential nominators with a strong **call for nominations** that will result in **an increase in the number of valid nominations** received.
- 2.2.4 To create an outreach plan with communications strategies that **celebrates excellence in order to tell the stories of MSD recipients** and stimulate more nominations.

2.3 Background

- 2.3.1 The OSGG is responsible for supporting the Governor General in fulfilling his role as The Queen's representative in Canada. The Governor General's responsibilities revolve around constitutional duties, the role of commander-in-chief, representing Canada abroad, encouraging excellence and bringing Canadians together.
- 2.3.2 Through the Canadian Honours System, the Governor General presents honours and awards on behalf of all Canadians to recognize those people who have demonstrated excellence, courage or exceptional dedication to service in ways that bring special credit to this country.



- 2.3.3 The MSD were created by Her Majesty Queen Elizabeth II to recognize an individual for a remarkable achievement accomplished over a limited period of time. These decorations are part of the Canadian Honours System and include a military and a civil division, each division with a Cross and a Medal.
- 2.3.4 The civil division of the MSD recognizes individuals for a remarkable deed or activity accomplished over a limited period of time, which brought honour to their community or to Canada. The decoration is given for contributions in any field of endeavour. From advocacy activities to health care services or research, and from public service to humanitarian achievements, recipients excel in a broad range of activities.
- 2.3.5 Nominations for the civil division can be submitted in writing to the Chancellery of Honours by anyone throughout the year – there is no set deadline.
- 2.3.6 The civil division of the MSD was placed on hold in 2006, pending review. This program is being reintroduced on December 11, 2015 with an inaugural ceremony held at Rideau Hall, in Ottawa, where 44 recipients will receive the honour from His Excellency the Right Honourable David Johnston, Governor General of Canada.
- 2.3.7 The objective of the renewed civil division of the MSD program is to create a flagship program of the Chancellery of Honours and increase the number of nominations submitted annually.

3.0 REQUIREMENT

- 3.1 To reintroduce the civil division of the MSD program to Canadians, the OSGG requires the professional help of a creative agency. This agency will provide an Outreach and Branch Strategy, which includes a brand image, creative concepts and the production and implementation of these concepts. .

The strategy proposed by the agency must be focused on the following objectives:

- a. **Awareness:** To create broad public awareness of the civil division of the MSD program amongst Canadians.
 - b. **Call for Nominations:** To invite Canadians to nominate their peers for the civil division of the MSD program.
 - c. **Celebrate Excellence:** To tell the stories of extraordinary Canadians who have previously been recognized with the civil MSD to inspire their fellow citizens.
- 3.2. The Brand Strategy and Outreach Plan must include an overarching plan which details the branding campaign and creative concepts and production timelines for each of these three objectives, including but not limited to: positioning statements, target audiences, communications tools and tactics, marketing and social media. This strategy must be national in scope and bilingual.

4.0 APPLICABLE DOCUMENTS

- 4.1 Documents that shall be referred to in the provision of the services:
 - i. The OSGG – Who We Are / Encourage Excellence and Achievement (pdf);



- ii. 2013-2014 Media Clippings – Recent MSD (Civil Division) Presentations (pdf);
- iii. Meritorious Service Decorations (Civil Division) Fact Sheet; and
- iv. Caring Canadian Award and Meritorious Service Decoration Presentation to the Fondation Maman Dion, video available at https://www.youtube.com/watch?v=VMyBYc_55vQ.

5.0 DELIVERABLES

- 5.1 The Contractor will provide specific deliverables within the determined time frame. These deliverables include, but are not limited to:
 - 5.1.1 A project work plan schedule and budget which includes the implementation of the proposed branding strategy and creative concepts and production, as well as the key performance indicators to measure successful implementation;
 - 5.1.2 A brand analysis report on the current brand positioning and a summary presentation of findings;
 - 5.1.3 A presentation of initial Brand Strategy and direction;
 - 5.1.4 A presentation with recommendations for the Outreach plan with proposed deliverables and key performance indicators
 - 5.1.5 The development of brand creative, which includes the production and implementation of content relating to the brand strategy and creative concepts. For example, the development of a brand vision, positioning statement, “look and feel”, website content, videos, social media content and other promotional materials, etc..
 - 5.1.6 A report and presentation on the Outreach and Brand Strategy, branding campaign, creative concepts and production.
- 5.2 The Contractor must provide monthly progress reports which must include, but not limited to:
 - i) Weekly progress reports summarizing work completed to date;
 - ii) Planned work and the identification of target completion dates; and
 - iii) Risks or impediments that could impact a successful project completion.
- 5.3 The Contractor must prepare a record of decisions from meetings and must provide them to the Project Authority for review and approval.
- 5.4 The Contractor must maintain a history of all meetings as well as of all incremental changes to action items and submit it to the Project Authority or Contracting Authority when requested.
- 5.5 An in-person presentation of the final project deliverables identifying key success factors and performance indicators. The final report should also summarize important project findings and expected outputs in the short, medium and long-term.



6.0 RESPONSIBILITIES

6.1 OSGG (Client)

6.1.1 The OSGG will provide thorough background briefings on OSGG's mission, vision and values; corporate structure and planning process; overall environment; stakeholders and audiences.

6.2 Contractor

6.2.1 The Contractor is responsible for the following:

- Identify and review background information required;
- Attend (in-person) kick-off meeting and site visit;
- Proactively communicating any project related issues with the Project Authority;
- Ensure all documents and presentation materials are submitted in a format compatible with OSGG systems;
- Make revisions to Brand Strategy and Outreach Plan in a timely fashion based on feedback from the Project Authority;
- Participate in meetings agreed upon in the project schedule;
- Ensure that all material is developed with the target audiences in mind and is creative and engaging;

7.0 CONSTRAINTS

7.1 The Office, including the Chancellery of Honours, is a national institution and the creative services proposed by the Contractor must reflect Canada's cultural and regional diversity.

7.2 The Office is a bilingual institution and offers public programming in both official languages. The communications approach, outreach strategy and creative services must take bilingualism into consideration and clearly demonstrate how the civilian MSD program will be presented in both official languages. Furthermore, deliverables must be in accordance with the *Official Languages Act*.

7.3 The Contractor must assign a project lead that is either an executive or creative director.

7.4 The Contractor must take into account existing OSGG materials and improve upon them:

- Current visuals associated with the civil division of the MSD (insignia design and ribbon colours);
- Current web page (www.gg.ca/msd) and its content;
- Existing photo and video files;
- Existing social media accounts @GGDavidJohnston and @RideauHall; and
- Existing media relations capacities of the OSGG and its Press Office.



- 7.5 The Brand Strategy and Outreach Plan must be developed taking into consideration and be complementary to the Canadian Honours System program branding, for example the Governor General's Caring Canadian Award (caring.gg.ca) and the Governor General's Innovation Awards (innovation.gg.ca). The Contractor must take into consideration the progress and results from ongoing branding exercises.

8.0 TIMEFRAMES

- 8.1 The work will be accomplished through the following phases:

Phase 1: Outreach and Brand Strategy development (points 5.1.1 to 5.1.3)

Phase 2: Implementation of Outreach and Brand Strategy (point 5.1.4)

Phase 3: Creative content production (points 5.1.5 and 5.1.6)



ANNEX B

BASIS OF PAYMENT

1.1 Pricing Schedule

- 1.1.1 The Bidder must provide a pricing schedule and include it in its financial proposal.
Pricing must only be contained in the financial proposal.
- 1.1.2 Bidders must provide a price breakdown that includes all costs necessary to perform the work, as follows:
 - 1.1.3 **Labour:** For each labour category, bidders must indicate:
 - a) the quoted firm daily or hourly rate, inclusive of overhead and profit, if any; and
 - b) the corresponding estimated level of effort (i.e. number of days or hours).
 - 1.1.4 **Materials and Supplies,** if applicable: Bidders should identify each category of materials and supplies required for purchase and provide the pricing basis of each one. Bidders should indicate, on a per category basis, whether the items are likely to be consumed during the performance of the contract.
 - 1.1.5 **Other Direct Charges,** if applicable: Bidders should identify any category of other direct charges anticipated, such as long distance communications, providing the pricing basis for each and explaining the relevance to the work.
 - 1.1.6 **GST/HST,** if applicable: any applicable GST and (or) HST is (are) to be shown separately (with the exception of the Travel & Living Expenses).
- 1.2 **The maximum funding** available for the Contract resulting from the bid solicitation is **\$140,000.00** (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.



ANNEX C

Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

| Milestone No. | Description | Firm Amount | Due Date |
|---------------|-------------|-------------|----------|
| | | | |
| | | | |
| | | | |