



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

SOLICITATION AMENDMENT

MODIFICATION DE L'INVITATION

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Solicitation remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'invitation demeurent les mêmes.

Comments - Commentaires

THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT / CE DOCUMENT COMPORTE
UNE EXIGENCE EN MATIÈRE DE SÉCURITÉ.

Vendor/Firm Name and Address

Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Special Projects/Projets Spéciaux

11 Laurier St./11, rue Laurier

Place du Portage/, Phase III

Floor 10C1/Étage 10C1

Gatineau

Québec

K1A 0S5

Title - Sujet RELOCATION ASSISTANCE - CAF	
Solicitation No. - N° de l'invitation W6369-150002/A	Amendment No. - N° modif. 005
Client Reference No. - N° de référence du client W6369-150002	Date 2016-04-08
GETS Reference No. - N° de référence de SEAG PW-\$\$ZL-106-29862	
File No. - N° de dossier 106zl.W6369-150002	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2016-04-15	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Sanford, Gordon	Buyer Id - Id de l'acheteur 106zl
Telephone No. - N° de téléphone (873) 469-4633 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction:	

Instructions: See Herein

Instructions: Voir aux présentes

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

Solicitation W6369-150002/A

Amendment 005

This solicitation amendment is raised to:

1. Publish questions and responses, as well as an updated presentation deck, from the March 1, 2016 GCRSS Bidders' Conference in Section A; and
2. Modify the bid solicitation as detailed in Sections B.

SECTION A: MARCH 1, 2016 BIDDERS' CONFERENCE QUESTIONS AND ANSWERS

Question	Response
(a) Will all questions asked be circulated to all of the bidders?	Yes, they will all be posted on buyandsell.gc.ca.
(b) Regarding the reloadable debit card – there is an Industry concern that some suppliers in remote areas may not accept credit cards?	Funds loaded onto the card can be taken to their own banks and the funds can be transferred. Funds will always be facilitated.
(c) Can you expand on the Canadian Content section?	Canada has invoked Canadian Content Policy for this procurement. Preference will be given to Bidders providing 80% of services from within Canada.
(d) Regarding Certification, will there be an external review for Certification?	There could be an audit to ensure the contractor is living up to the certification. Canada has the right to validate that a Bidder continues to meet its certification.
(e) Do you have an idea when there will be access to the TPSP directory? When will it be made available?	The existing TPSP Directory (excluding fees/prices) will be made available to the successful Bidder after the contract is awarded.
(f) Regarding page 29 of the RFP on Point Rated Technical Criteria, R2 – Program Delivery Manager (PDM). In reference to the point system in the RFP (50 pts, 40 pts, 30 pts, 0 pts), the accounts in Canada are not that large and that none of them will have such a large amount.	R2 does not state that the number of relocations has to be based on Canadian accounts.
(g) Please explain the meaning of “No Member’s personal information will be captured and stored – Slide deck #7”.	There was an error in the slide presentation previously distributed. A corrected version will be uploaded to buyandsell.gc.ca. Note: The updated Bidders' Conference presentation deck is attached at the end of this Amendment.
(h) Can you define the role of the vendor pertaining to travel arrangements? Is it the member who does their own travel arrangements?	The Contractor will facilitate travel arrangements with the contractor of Canada's Shared Travel Services Initiative (STSI) and there is no requirement for the Contractor to hold a travel agent's license. See Section B below for modifications to the bid solicitation.

SECTION B: MODIFICATIONS TO BID SOLICITATION

Modification #36:

At Attachment 1 to Part 4, Technical Evaluation Procedures, 1.1 Mandatory Technical Criteria Numbers M1 and M2, replace each of the 2 Bid Preparation Instructions sections in their entirety with the following:

The Bidder must provide a list of client organization names and the associated volume for each client in order to substantiate the total Relocation Service experience claimed. Canada may select any number of a Bidder's clients for the purpose of verifying the volume claimed. For each reference/client selected, the Bidder must, when contacted by Canada, provide the contact information to the Contracting Authority within 2 business days, as further described in sections 4.5 Additional Evaluation Procedures and 3.2 (c) (viii) Customer Reference Contact Information. If the Bidder is unable to provide reference contact information due to a valid reason such as a non-disclosure agreement or other contractual impediment, the Bidder must provide the Contracting Authority with proof that such a contractual impediment exists and substantiate, by other means acceptable to Canada (e.g. redacted invoices) that the volume claimed is accurate. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Modification #37:

At Attachment 1 to Part 4, Technical Evaluation Procedures, 1.2 Point-Rated Technical Criteria No. R1, replace the Bid Preparation Instructions section in its entirety with the following:

The Bidder must provide a list of client organization names and the associated volume for each client in order to substantiate the total Relocation Service experience claimed. Canada may select any number of a Bidder's clients for the purpose of verifying the volume claimed. For each reference/client selected, the Bidder must, when contacted by Canada, provide the contact information to the Contracting Authority within 2 business days, as further described in sections 4.5 Additional Evaluation Procedures and 3.2 (c) (viii) Customer Reference Contact Information. If the Bidder is unable to provide reference contact information due to a valid reason such as a non-disclosure agreement or other contractual impediment, the Bidder must provide the Contracting Authority with proof that such a contractual impediment exists and substantiate, by other means acceptable to Canada (e.g. redacted invoices) that the volume claimed is accurate. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Modification #38:

At section 7.8, Authorities, insert new subsection (d) below, to add a new representative of the Department of National Defence, for whom the Work is being carried out under the Contract:

(d) **Procurement Authority**

The Department of National Defence Procurement Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: _____
Facsimile: _____
E-mail address: _____

The Procurement Authority provides material management, contracting and financial management advice, support and oversight related to the procurement of the Canadian Armed Forces relocation contract; 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.

Modification #39:

At Annex A – Statement of Requirements, 5.1.13, Travel Arrangements made with the Shared Travel Service Initiative (STSI), replace subsection a. in its entirety with the following:

- a. Facilitate travel arrangements by providing travel details, including a government-supplied TAN, to Canada's STSI contractor, who will execute the travel booking.

Modification #40:

At Attachment 1 to Part 4, Technical Evaluation Procedures, 1.2 Point-Rated Technical Criteria, No. R3 – Management of Implementation Phase, in the Point Rated Technical Criterion section, delete “4.2”, as was amended at Modification #6 of RFP Amendment 001, and replace with “4.1”.

Modification #41:

At Annex A – Statement of Requirements, 3.2 In-Service Delivery Phase, re-instate subsection e., which was inadvertently deleted at Modification #12 of Amendment 001, as follows:

- e. Make travel arrangements in accordance with the TBS Travel Directive using the Shared Travel Services Initiative (STSI).

Modification #42:

Due to possible uncertainty regarding the exact date that the Contract will be awarded, the following changes are needed to remove precise calendar dates in defining the various periods of the Contract and in describing each year of the Contract in 8 Tables within Annex B – Basis of Payment.

- i. At section 7.7 - **Contract Period**, subsection (b) (ii), replace the last sentence with the following:
The period of the Contract is from the date the Contract is awarded to 6.5 years later, plus any option period(s), if exercised.
- ii. At section 7.7 (c) **Implementation Period**, replace the first sentence with the following:
The first 6 months after the date the Contract is awarded is a transition/ramp-up period.
- iii. At section 7.7 - Contract Period, replace subsection (d) in its entirety with the following:
(d) **In-Service Period**
The Work set out under Annex A section 5.0 for the provision of relocation services commences on the Service Effective Date (SED) that begins 6 months after the date the Contract is awarded, and ends 5 years later. The end date of the In-Service Period is subject to change if Canada extends the Contract in accordance with subsection 7.7 (g).
- iv. At section 7.7 - Contract Period, replace subsection (f) in its entirety with the following:
(f) **Out-Going Transition Period**

The Contractor acknowledges that the nature of the services provided under the Contract requires continuity and that an out-going transition period is required. The Contractor must provide the Work set out under Annex A section 6.0. The Out-Going Transition Period begins immediately following the In-Service Period, as defined in subsection 7.7 (d) above. The start and end dates of the Out-Going Transition Period are subject to change if Canada extends the Contract in accordance with subsection 7.7 (g), i.e. Option to Extend the Contract.

- v. At Annex A SOR, section 3 – Service Delivery Phases, replace subsection 3.1 - Implementation Phase in its entirety with the following:

3.1 Implementation Phase

The Implementation Phase commences upon Contract award and is expected to end 6 months later, at the SED. During the Implementation Phase, the Contractor must undertake all necessary planning activities to establish the processes, resources, and infrastructure to support the delivery of services in the In-Service Delivery Phase, and to provide the required deliverables.

- vi. At Annex A SOR, subsection 4.2.1 - Implementation Plan, delete “December 1, 2016” and replace with “the SED”.
- vii. At Annex B – Basis of Payment, replace Table 1 - Firm All-Inclusive Administration Price, and Note 1 with the following:

Table 1 - Firm All-Inclusive Administration Price								
	Contract Year 1	Contract Year 2	Contract Year 3	Contract Year 4	Contract Year 5	Contract Year 6 (Out-Going Transition)	Option Year #1	Option Year #2
	See Note 1							
Relocations	\$	\$	\$	\$	\$	See Note 2	\$	\$

Note 1: Relocation files can only be actioned after the Implementation Period.

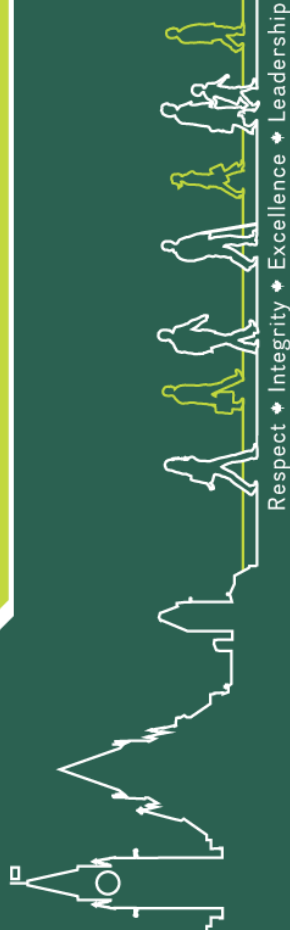
- viii. At Annex B – Basis of Payment, for each of Table 3A, Table 3B, Table 3C, Table 3D, Table 3E, Table 3F, and Table 3G, replace the 2 grey-shaded header rows with the following 1 row:

Province	Contract Year 1	Contract Year 2	Contract Year 3	Contract Year 4	Contract Year 5	Contract Year 6 (Out-Going Transition)	Option Year #1	Option Year #2
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Modification #43:

At Part 3, section 3.1 (e) (iii), in the last sentence before the Example, replace “If the Bidder does not submitted...” with “If the Bidder has not submitted...”.

ALL OTHER TERMS AND CONDITIONS OF THE BID SOLICITATION REMAIN UNCHANGED



Serving
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CANADIANS.

Bidders' Conference: The Administration of the Canadian Armed Forces Relocation Program

March 1, 2016



Government
of Canada

Gouvernement
du Canada

Canada

Agenda

- Opening Comments and Objective (PSPC)
- Fairness Monitor (FM)
- Procurement Overview & RFP Schedule (PSPC)
- Statement of Requirements Overview (CAF)
- Bid Preparation Instructions (PSPC)
- Communications and Enquiries (PSPC)
- Questions and Answers (CAF/PSPC)

Opening Comments and Objective

- Introductions (Canada)
- Introductions (Suppliers)
- Purpose of this Bidders' Conference
 - To review the requirements for the submission of bids described in the RFP
 - Highlight bid submission requirements to help avoid inadvertent non-compliance
 - Answer questions regarding submission requirements
- **Bid conference protocols**

Fairness Monitor

- A Fairness Monitor (FM) is an independent third-party, holding a professional designation/accreditation, engaged to observe a Departmental activity, to render an impartial opinion and attest whether decisions taken by the Department are fair, open, and transparent.
- Specifically, the FM will:
- Observe activities undertaken during the engagement and provide an unbiased and impartial opinion on the fairness, openness, and transparency of that activity, including:
 - Assess activity documentation including, but not limited to Request for Qualification (RFQ),
 - Request for Proposals (RFP), site visit protocols, evaluation criteria, etc.
 - Attend meetings or events such as: information sessions, industry days, site visit(s), bidder conference(s), evaluation meeting(s), consensus meeting(s), debriefing session(s), etc.
 - Monitor communications with bidders, such as, but not limited to, bidders questions and responses, requests for clarification, e-mail exchanges, debriefings, one-on-one sessions etc.
 - Monitor the actions and decisions of the procurement team and determine if these are consistent with the principles of fairness, openness and transparency.
- Maintain an open dialogue with the Contracting Authority (CA).

Fairness Monitor continued

- Seek clarification from the Operational Integrity Sector (OIS), Departmental Oversight Branch (DOB) if unsure whether an activity is within the scope of the Fairness Monitoring engagement.
- Directly inform the CA of any concerns with the activities monitored, obtain mutual understanding of the situation, and seek a resolution to the matter in real time.
- Bring any unresolved potential fairness issue(s) to the attention of the OIS, DOB promptly, and in all cases while there is still opportunity to address the potential deficiency.
- Provide an attestation of assurance on the fairness, openness, and transparency of the monitored activities in written reports to the OIS, DOB.
- The FM Specialist will not offer subject matter expertise, advice or guidance.

Procurement Overview

Request for Proposal (RFP)

- RFP was posted February 16, 2016 on buyandsell.gc.ca.
- RFP will close April 15, 2016 14:00 Eastern Daylight Time (EDT).
- Last day for Bidders to submit questions that Canada is obligated to answer is March 25, 2016.
- Anticipated that evaluation will be completed and contract awarded by June 1, 2016.

Statement of Requirements (SoR)

- A web-based application which will enable increased accessibility to both members and their families to complete the self-directed guided relocation process electronically from any location connected to the web.
- Members will be provided virtual relocation guidance primarily via interactive, recordable on-line service from the Contractors own office(s).
- A reloadable declining balance relocation credit/debit card will facilitate financial tracking and reporting.

Statement of Requirements

Support to Regions and Work Locations SOR 2.2

- The Contractor must provide virtual services to the CAF members and their families primarily via interactive, recordable on-line service, from the Contractors own office(s).

Web Based Services SOR 4.1.9 & 5.1.7

- The Contractor must develop and provide access to secure web-based services which must have a dedicated delivery portal for use by authorized CAF members and their families to access relocation information, counselling and planning services, in accordance with the policies based on any element of the CAF RP that relates to the CAF member's relocation needs or circumstances.

Third-Party Service Provider (TPSP) Management SOR 4.1.10

- The Contractor is required to arrange and manage subcontracts with TPSPs, ensure that the TPSPs adhere to the maximum rates/fees for the required service when performing expense reconciliation, and not collect referral fees. Payments to the TPSPs will be made by the CAF member.

Preliminary Relocation Assessment (PRA) SOR 4.2.21

- No CAF member personal information will be captured and stored by the Contractor. The Contractor must develop an online PRA to be used throughout the Contract Period. The PRA will outline the required details that will be used to determine specific information, advice and counsel that the Contractor will provide to each CAF member.



Statement of Requirements continued

Reloadable Relocation Card SOR 5.1.2

- The Contractor will process the CAF RP “flow-through” costs by means of a declining balance relocation card that is to be pre-arranged by the Contractor to provide the service that will be funded by the CAF.
- The Contractor will reload the cards based on their estimation of members authorized expenditures.

Expenditure Tracking and Reporting SOR 5.1.15 & 5.1.18

- The Contractor must account for all financial transaction based on the CAF member’s pre-assigned Move Number. These expenditures must be recorded and tracked in the Contractors Information Management Expenditure Tracking System (IMETS). Expense verifications are required when preparing claims for final settlement.

Reporting SOR 5.2 and SOR Appendix 1

- The Contractor must provide computer generated, daily, monthly, quarterly reports as outlined in Appendix 1.

Canadian Content

- The requirement is subject to a preference for Canadian services.
- Bidders that are providing a Canadian service (as defined in SACC Manual Clause A3050T found at buyandsell.gc.ca) must complete the certification.
- The certification must be submitted prior to or at time of bid close.
- The evaluation team will determine first if there are two or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn in accordance with the process described below, and fewer than two responsive bids with a valid certification remain, Canada will continue evaluating only the bids with a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.

Conditional Bids and Assumptions

- The Bidder must not make conditions in any part of its Bid.
- Conditional bids will be deemed non-responsive.
- Example of Conditional Bids:
 - qualifying or otherwise changing a provision of the RFP, (e.g. stating that the bid is valid for less than 365 days from date of bid close)
- Bidders should use the RFP question and answer process if unsure of a how a requirement will impact its price and/or a contract deliverable.
- Any and all Bidder assumptions are made at the Bidder's own risk and must be included in the Bidder's prices (i.e. the Contractor will only be paid in accordance with the Basis of Payment described in the contract).

Bid Section Preparation

- Only one bid may be submitted by a Bidder.
- Each Bidder is requested to submit a total of four memory sticks.
- Two memory sticks each containing Sections I, III, and IV and two memory sticks each sticks containing Sections II.

Section Number	Title of Section	Paper Copies	Flash Drives (i.e. soft copies)
Section I	Technical Bid	5	2
Section II	Financial Bid	2	2
Section III	Certifications	2	2
Section IV	Additional Information	2	2

2-Phased Evaluation Process

- A 2-phased evaluation process will be followed as described in Part 4 – Evaluation Procedures and Basis of Selection.
- Phase 1 consists of a 2-step process involving a multi-step evaluation of the rated and mandatory criteria. Phase 2 consists of the financial evaluation.
- Phase 1 Step 1 will consist of a review of a Bidder's bid and, if necessary, the release of a Preliminary Evaluation Report (PER) to all Bidders.
- Phase 1 Step 2 will commence once responses to the PER are received and will include a final technical bid evaluation for all bids taking into account the additional or different information submitted by a Bidder in response to the "Preliminary Evaluation Report".
- Bids that have demonstrated responsiveness at the conclusion of Phase 1 will continue to be evaluated at Phase 2 – Financial Bid Evaluation.

Mandatory Evaluation Requirements

- The mandatory technical evaluation criteria will be assessed on a pass/fail basis. A Bid that fails to meet the mandatory technical evaluation criteria will be declared non-responsive.
- Mandatory technical evaluation are found at Attachment 1 to Part 4 – Evaluation Procedures.
- The Bidder should be complete when responding to each criterion even if it results in a duplication of information provided elsewhere in the Bid.
- If the Bidder claims experience it should also state how doing so meets the requirement.

Rated Evaluation Criteria

- The Bidder is requested to fully address each element in the rated submission requirements. Note that evaluators will assess and assign scores to the Bid based on the associated evaluation criteria and the corresponding scoring scale.
- A bid will be considered by Canada to be non-responsive if the bid fails to achieve the mandatory minimum pass standard.
- Mandatory technical evaluation are found at Attachment 1 to Part 4 – Evaluation Procedures.

Point Rated Technical Criteria	Required Minimum Number of Points	Maximum Number of Points
Bidder's Experience	75	145
Bidder's Approach and Methodology	599	960

Certifications and Forms

Bidders are required to submit certifications and forms.

- Required with Bid:
 1. 5.1 (a) Form 2 - Declaration of Convicted Offences
 2. Insurance - letter with bid as per 6.3 (a)
 3. 5.1 (b) Form 5 - Canadian Content Certification
- Requested with Bid:
 1. 2.4 Former Public Servant
 2. 3.7 (c) (i) Form 1 - Bid Submission Form
 3. 3.7 (c) (ii) Security
 4. 5.2 (a) Form 3 - List of Names Form
 5. 5.2 (b) Form 4 - Federal Contractors Program for Employment Equity – Bid Certification 6.2
Financial Capability (as requested by CA)

Financial Evaluation

- The Total Evaluated Bid Price will be calculated using the Pricing Tables completed by the Bidders.
- The financial criteria are described in Part 3, Attachment 3.1, Pricing Schedule.
- The Bidder must insert data in each of the spreadsheet locations that is highlighted or backfilled in with the colour turquoise. All calculations are imbedded in this workbook.
- For the purpose of this Evaluation and based on the availability of validated data at the time of release of this Request For Proposal, the Relocation Volumetric data for Fiscal Years April 1, 2010 to March 31, 2015 will be used as the basis for calculating the arithmetic average used to determine the Total Evaluated Bid Price, for all bids received.
- The relocation data has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of relocation services will be consistent with this data. It is provided purely for information purposes.

Basis of Selection

- Best values will be determined based on a Highest Combined Rating of Technical Merit (60%) and Price (40%).
- To be declared responsive, a bid must:
 - i. Comply with all the requirements of the bid solicitation;
 - ii. Meet all the mandatory evaluation criteria; and
 - iii. Obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.
- Bids not meeting (i) and (ii) and (iii) will be declared non-responsive.
- Neither the responsive bid obtaining the highest number of rated points nor the one with the lowest evaluated price will necessarily be accepted.

Security Requirements

- Canadian Bidders must meet the security requirements described at section 7.5 of the Resulting Contract.
- Foreign Bidders must meet the security requirements described at section 7.6 of the Resulting Contract.
- Contractors must have the security in place no later than 2 months prior to the Service Effective Date (SED).
- Bidders should start to address the security requirements as soon as they decide to bid.
- Any delays caused by the Contractor's failure of inability to obtain the required security clearance, within the stated times, would be grounds for default as described in the Resulting Contract.
- Canada's data must be stored in databases located in either Canada or the United States of America. All databases must meet all security requirements described in the RFP.

Communication and Enquiries

- Throughout the RFP stage, all enquiries must be submitted in writing to the Contracting Authority, the single point of contact, via e-mail at: gordon.sanford@pwgsc-tpsgc.gc.ca
- Communications with Bidders will be via amendments to the RFP posted on buyandsell.gc.ca.
- Bidders are requested to submit enquiries at least 21 calendar days before the Bid Closing Date and Time [state date]. Enquiries received after that time may not be answered.
- Overseen by the Fairness Monitor.





Questions and Answers

- Bidders have the opportunity to ask questions.
- Any clarifications or changes to the bid solicitation resulting from the Bidders' Conference will be included as an amendment to the bid solicitation.