



Procurement and Contracting Services  
30 Victoria Street  
Gatineau, Quebec K1A 0M6

## REQUEST FOR STANDING OFFER AMENDMENT

The Request for Standing Offer is hereby amended; unless otherwise indicated, all other terms and conditions of the Request for Standing Offer remain the same.

<b>RFSO Amendment No.</b>  3	<b>RFSO Amendment Date:</b>  July 29, 2016
<b>Office of the Chief Electoral Officer File No.</b>  ECBR-RFSO-16-0005	
<b>Title:</b>  Facilitation Services	
<b>Request for Standing Offer Closing Date:</b>  August 9, 2016 at 2:00pm (Gatineau time)	
<b>ENQUIRIES – address enquiries to the Contracting Authority:</b>  <b>Office of the Chief Electoral Officer of Canada</b> Procurement and Contracting Services 30 Victoria Street Gatineau, Quebec K1A 0M6  proposition-proposal@elections.ca	
<b>Attention:</b>  Barbara Robertson	<b>Tel No.</b>  819-939-1493

## **Part 1. Interpretation**

- 1.1** Elections Canada hereby amends in accordance with this amendment the Request for Standing Offer for Facilitation Services bearing number ECBR-RFSO-16-0005 and dated June 29, 2016 (the "RFSO"). This amendment hereby forms part of the RFSO.
- 1.2** Unless defined herein or unless the context otherwise requires, all of the words and phrases defined in the RFSO and used in this amendment shall have the same meanings assigned to them in the RFSO.

## **Part 2. Questions and Answers**

The following question(s) have been asked in response to the Request for Standing Offer and Elections Canada hereby answers as follows:

### **2.1 Question No. 3**

Question:

SECTION A – INSTRUCTIONS TO OFFERORS Paragraph 8 states:

*"In addition to the information requested in the individual criterion, the Offeror is requested to include complete client contact information for each project description including the client contact name, title and telephone number or e-mail address. The client contact for any project must be an employee of the originating client organization. EC reserves the right to request client contact information, at any time during the evaluation process, for the purposes of verification."*

It appears clear from later in the RFSO that this is intended to only apply to the Client Reference Templates submitted in response to S-M4. For example we see that all the other requirements ask for a description of projects but not contact information (except in the case of the bilingual projects).

Can you confirm then that only the Client Reference Templates (S-M4) and the Bilingual requirements (J-M4 & S-M5) require complete contact information?

Answer: Please see Amendment 3.1 below.

S-M4 requires the completion of Template B – Client Reference Template including complete client contact information (client contact name, title and telephone number or e-mail address). J-M4 and S-M5 require only complete contact information.

In addition to the information requested in all other individual criteria, Offerors are

requested to include complete client contact information for each project description provided in response to J-M2, J-M3, S-M2, S-M3, J-R1, J-R3, S-R1, S-R2, SR-4 and SR-6. As per paragraph 2.15.1 of the Request for Standing Offer, in conducting its evaluation of the offers, Elections Canada may, but will have no obligation to contact any or all references supplied by Offerors to verify and validate any information submitted by them.

Offerors should make a best effort to obtain complete client contact information for all project descriptions. As per Section A, Paragraph 8 of Part 7 – Technical Evaluation Criteria, EC reserves the right to request client contact information, at any time during the evaluation process, for the purposes of verification.

## 2.2 Question No. 4

### Question:

J-M3 on Experience Facilitating Events for Federal Government Clients states:

*The proposed Junior Facilitators (Principal and Alternate) must each have experience facilitating a minimum of 20 events for Federal Government clients within the past eight years, whereby each event was a minimum of three hours in length with a minimum of ten participants.*

*Facilitating an event includes, at a minimum, planning, designing, organizing, and conducting the event.*

### **Submission Requirement**

*The Offeror must demonstrate that each proposed Junior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources' experience and by providing five project descriptions demonstrating the noted experience obtained within the time period specified above.*

*Each of the five project descriptions must include the following:*

- a) Name of the client organization*
- b) Event title or topic*
- c) Start and end dates of each event facilitated*
- d) Duration of each event facilitated*
- e) Brief description of the facilitation work performed*

We would like to confirm that as long as we have Certified the experience (as described above) and that we have only addressed the Submission Requirement that we have addressed the full requirement. For example in the case above, we do not have to list the 20 events - just five project descriptions. Can you confirm for this and all similar requirements?

Answer: Correct. To demonstrate experience Offerors are required to comply with the submission requirements of each individual evaluation criterion. For example, for J-M3, Offerors do not need to list 20 events; instead, Offerors must certify the proposed resources' experience using Part 9 – Certificates and must provide five project descriptions meeting the submission requirements listed.

### **2.3 Question No. 5**

Question: Indicated in the RFSO Technical Criteria Sections J-M4 and S-M5 it indicates that the client reference must *“attest to the proposed Facilitators’ capabilities with regards to reading and speaking in French and English, at an advanced level, and with regards to capturing notes in both French and English.”* Is the submission requirement the contact details only (of someone who can attest to this when called) or is a reference letter detailing this capability in writing required as part of the submission?

Answer: A reference letter detailing the resource’s capability is not required as part of the submission.

### **2.4 Question No. 6**

Question: As indicated throughout the Technical Criteria, for example J-M2, J-M3, S-M2 and S-M3, the reference of an applicable event is said to be a minimum of 3-hour sessions with a minimum of 10 participants. Should an event last longer than 3 hours but the participants are each only present for half of the session, will this be attributed to the total experience?

Answer: The minimum number of participants required must be present for the minimum required time period. For example, for J-M2, J-M3, S-M2 and S-M3, a minimum of ten participants must have been present at the event for a minimum of three hours.

### **2.5 Question No. 7**

Question: As indicated throughout the Technical Criteria, for example J-M2, J-M3, S-M2 and S-M3, a description of the work performed and specifics about the events are required, however in paragraph 8 of the Instructions to Offeror *“In addition to the information requested in the individual criterion, the Offeror is requested to include complete client contact information for each project description including the client contact name, title and telephone number or e-mail address.”* We take this to mean that each project reference throughout the document requires a contact. Please confirm our understanding of the requirement.

Answer: See answer to Question 3.

## 2.6 Question No. 8

Question: For Technical Criteria J-M2 and S-M2, we understand that EC requires one project example per year of experience. This indicate that for a Junior Facilitator EC requires one from 2011, one from 2012, etc.. to the present year and a senior facilitator requires the same going back 10 years. The client contact at many organisations will have shifted over such a long period. We would like to confirm that the resources require one project example to represent each year of experience. This would mean we would provide one example from 2011, one example from 2012, etc... with a client contact for each for verification.

Answer: Yes, Elections Canada requires one project example per year of experience obtained during the period specified.

For criterion J-M2, the proposed Junior Facilitators must each have a minimum of five years of experience facilitating events (within the past ten years). For S-M2, proposed Senior Facilitators must each have a minimum of ten years of experience facilitating events (within the past fifteen years). Offerors must provide project descriptions for one event for each year of experience demonstrated. For example, a Junior Facilitator may demonstrate the required experience by providing one project description for each year such as 2009, 2011, 2013, 2014, and 2015.

Regarding the client contact information, please see the response to Question 3.

## 2.7 Question No. 9

Question: Given that you have requested contact information for each project reference, should the client contact be the original project authority from the period the work was conducted (for Senior Facilitators this may be 10 years ago and the client may have moved on) OR a current contact within the client organisation, as available, who may not have firsthand reference of the original project? Should no reference be available, and the requirement for a client contact to attest to the experience (Instructions to Offeror, Paragraph 8), should additional project references from more recent projects to meet the appropriate number requested?

Answer: The original client contact person would be preferred. Alternatively, Offerors may provide the client contact information of someone from the originating client organization who can validate the proposed facilitator's experience.

Regarding the client contact information, please see the response to Question 3.

## 2.8 Question No. 10

Question: For J-R3 the maximum points available is 10 and the maximum projects allowed is 2, to receive maximum points we must provide project examples that used multiple modern technologies. However, it would be ill-advised to use all five methods indicated in any one project to avoid confusion or oversaturation on the part of the participant. Please clarify this requirement.

Answer: Elections Canada agrees with this observation and hereby amends criteria J-R3 and S-R6. Please refer to the revised Part 7 – Technical Evaluation Criteria.

### **Part 3. Amendments**

#### **3.1 Amendment to Part 7 – Technical Evaluation Criteria, Section A, Paragraph 8**

After posting the RFP, Elections Canada noticed an error in Section A – Instructions to Offerors, Paragraph 8 in the French version of Part 7 – Technical Evaluation criteria. In order to rectify this, the French version of the RFP is hereby amended by deleting in its entirety Paragraph 8 of Part 7 of the RFP and replacing it with the following:

En plus des renseignements demandés pour chaque critère, l’offrant devrait joindre les coordonnées complètes du client pour chaque description de projet, notamment le nom et le titre de la personne ressource du client ainsi que le numéro de téléphone ou l’adresse courriel. La personne ressource du client doit être un employé de l’organisation cliente d’origine. EC se réserve le droit de demander les coordonnées du client en tout temps durant le processus d’évaluation, aux fins de vérification.

The English version does not require any rectification.

#### **3.2 Amendment to Part 7 – Technical Evaluation Criteria**

The Request for Standing Offer is hereby amended by deleting in its entirety Part 7 – Technical Evaluation Criteria and replacing it with the attached Part 7 – Technical Evaluation Criteria (revised July 25, 2016).



# Facilitation Services

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## Part 7

### Technical Evaluation Criteria

Revised July 25, 2016

**CONTENTS****SECTION A – INSTRUCTIONS TO OFFERORS****SECTION B – DEFINITIONS****TABLE A – MANDATORY TECHNICAL EVALUATION CRITERIA (JUNIOR FACILITATORS)**

#	MANDATORY TECHNICAL EVALUATION CRITERIA	MET/NOT MET
J-M1	Proposed Junior Facilitators	
J-M2	Experience Facilitating Events	
J-M3	Experience Facilitating Events for Federal Government Clients	
J-M4	Official Languages	

**TABLE B – MANDATORY TECHNICAL EVALUATION CRITERIA (SENIOR FACILITATORS)**

#	MANDATORY TECHNICAL EVALUATION CRITERIA	MET/NOT MET
S-M1	Proposed Senior Facilitators	
S-M2	Experience Facilitating Events	
S-M3	Experience Facilitating Events for Federal Political Parties or Senior Executives	
S-M4	Experience Managing Conflicts	
S-M5	Official Languages	

**TABLE C – RATED TECHNICAL EVALUATION CRITERIA (JUNIOR FACILITATORS)**

#	RATED TECHNICAL EVALUATION CRITERIA	Max Points per Facilitator
J-R1	Experience Facilitating Large Events – Principal and Alternate	15 points
J-R2	Facilitation Approach – Principal	30 points
J-R3	Experience Facilitating Using Modern Communication Technologies – Principal and Alternate	10 points
J-R4	Professional Qualifications – Principal and Alternate	10 points

**TABLE D – RATED TECHNICAL EVALUATION CRITERIA (SENIOR FACILITATORS)**

#	RATED TECHNICAL EVALUATION CRITERIA	Max Points per Facilitator
S-R1	Experience Facilitating Large Events – Principal and Alternate	15 points
S-R2	Experience Facilitating Town Halls – Principal and Alternate	10 points
S-R3	Experience Managing Conflicts – Principal and Alternate	10 points
S-R4	Experience Leading Decision Making Process with Financial Components – Principal and Alternate	10 points
S-R5	Facilitation Approach – Principal	30 points
S-R6	Experience Facilitating Using Modern Communication Technologies – Principal and Alternate	10 points
S-R7	Professional Qualifications – Principal and Alternate	10 points

**TEMPLATE A – IDENTIFICATION OF SERVICES****TEMPLATE B – CLIENT REFERENCE TEMPLATE**



**SECTION A – INSTRUCTIONS TO OFFERORS**

1. As part of their submission, Offerors are to complete Template A – Identification of Services.
2. Offerors must only respond to the evaluation criteria for the category (Junior and/or Senior) for which they are submitting a proposal. Offerors may submit a proposal for one category or both categories. For example, if Offeror A is submitting a proposal only to provide the services of Junior Facilitators, said Offeror would only submit responses to Table A and C below (criteria J-M and J-R). Whereas, if Offeror B is submitting a proposal for both categories, Junior and Senior, said Offeror must submit responses to Table A, B, C and D below (criterion J-M, S-M, J-R and S-R).
3. The Offeror must propose two resources for each category (Junior and/or Senior) for which it is submitting a proposal – one Principal Facilitator and one Alternate Facilitator. Both the proposed Principal Facilitator and Alternate Facilitator will be evaluated.
4. In order to facilitate the evaluation of the proposal, EC requests that Offerors address and present topics in the same order and with the same headings as the evaluation criteria. Offerors should clearly identify where in their proposal each criterion is addressed.
5. If more projects/events are provided than the requirements of the criterion, only the first projects/events in the proposal will be evaluated. Any excess projects/events will not be evaluated.
6. In determining years of experience, overlaps of years or months for projects submitted by the Offeror to demonstrate such experience will only be counted once for evaluation purposes.
7. Projects must have been completed by the proposal closing date. Any education/certification/professional qualification must have been completed by the proposal closing date.
8. In addition to the information requested in the individual criterion, the Offeror is requested to include complete client contact information for each project description including the client contact name, title and telephone number or e-mail address. The client contact for any project must be an employee of the originating client organization. EC reserves the right to request client contact information, at any time during the evaluation process, for the purposes of verification.
9. Cutting and pasting wording from the RFSO does not constitute demonstrating the requirement. Experience must be demonstrated by citing specific examples of work performed by the proposed resource that relate to the specific evaluation criteria. If the

Offeror's response does not fully demonstrate that the requirement is met by the project or experience cited, then the project experience will not be considered.

**SECTION B – DEFINITIONS**

Unless the context clearly requires otherwise, the capitalized terms used in the Technical Evaluation Criteria shall have the definitions assigned to them in the Contract or in the SOW. These definitions shall apply equally to both the singular and plural forms of the terms defined, and words of any gender shall include each other gender when appropriate.

**TABLE A – MANDATORY TECHNICAL EVALUATION CRITERIA (JUNIOR FACILITATORS)**

#	Mandatory Technical Evaluation Criteria	Scoring Methodology
J-M1	<p><b>Proposed Junior Facilitators</b></p> <p>The Offeror must propose two Junior Facilitators – one Principal Facilitator and one Alternate Facilitator.</p> <p><b>Submission Requirement</b> Using Template A – Identification of Services, the Offeror must provide the name of the proposed Principal Junior Facilitator and Alternate Junior Facilitator and clearly identify in its proposal which individual is the Principal Junior Facilitator and which is the Alternate Junior Facilitator.</p>	<input type="checkbox"/> Met  <input type="checkbox"/> Not Met
J-M2	<p><b>Experience Facilitating Events</b></p> <p>The proposed Junior Facilitators (Principal and Alternate) must each have a minimum of five years of experience facilitating events within the past ten years.</p> <p>One year of experience facilitating events is considered to be when the resource facilitates a minimum of ten events during the course of a calendar year whereby each event is a minimum of three hours with a minimum of ten participants. Facilitating an event includes planning, designing, organizing, and conducting the event.</p> <p><b>Submission Requirement</b> The Offeror must demonstrate that each proposed Junior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources' experience and by providing project descriptions for one event for each of the five years of experience (five project descriptions) demonstrating the noted experience obtained within the time period specified above. Each of the five project descriptions must include the following:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates of each event facilitated</li> <li>(d) Duration of each event facilitated</li> <li>(e) Brief description of the facilitation work performed</li> </ul>	<input type="checkbox"/> Met  <input type="checkbox"/> Not Met

#	Mandatory Technical Evaluation Criteria	Scoring Methodology
J-M3	<p><b>Experience Facilitating Events for Federal Government Clients</b></p> <p>The proposed Junior Facilitators (Principal and Alternate) must each have experience facilitating a minimum of 20 events for Federal Government clients within the past eight years, whereby each event was a minimum of three hours in length with a minimum of ten participants.</p> <p>Facilitating an event includes, at a minimum, planning, designing, organizing, and conducting the event.</p> <p><b>Submission Requirement</b></p> <p>The Offeror must demonstrate that each proposed Junior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources’ experience and by providing five project descriptions demonstrating the noted experience obtained within the time period specified above. Each of the five project descriptions must include the following:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates of each event facilitated</li> <li>(d) Duration of each event facilitated</li> <li>(e) Brief description of the facilitation work performed</li> </ul>	<input type="checkbox"/> Met <input type="checkbox"/> Not Met
J-M4	<p><b>Official Languages</b></p> <p>Each of the proposed Junior Facilitators must be able to perform the totality of the Work in both official languages, in particular with regards to communicating orally, reading and understanding text in both French and English, at an advanced level, and with regards to capturing notes in both French and English.</p> <p><b>Submission Requirement</b></p> <p>The Offeror must demonstrate that each proposed Junior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources’ capabilities and by providing the name and contact information of one client reference per Junior Facilitator that can attest to the proposed Facilitators’ experience facilitating events bilingually, in both official languages. The client reference must attest to the proposed Facilitators’ capabilities with regards to reading and speaking in French and English, at an advanced level, and with regards to capturing notes in both French and English.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not Met

#	Mandatory Technical Evaluation Criteria	Scoring Methodology
	<p>For each client reference, the Offeror must provide the following:</p> <ul style="list-style-type: none"><li>(a) Name of the client contact</li><li>(b) Name of the client organization</li><li>(c) Telephone number and/or email address of the client contact</li></ul>	

**TABLE B – MANDATORY TECHNICAL EVALUATION CRITERIA (SENIOR FACILITATORS)**

#	Mandatory Technical Evaluation Criteria	Scoring Methodology
S-M1	<p><b>Proposed Senior Facilitators</b></p> <p>The Offeror must propose two Senior Facilitators – one Principal Facilitator and one Alternate Facilitator.</p> <p><b>Submission Requirement</b> Using Template A – Identification of Services, the Offeror must provide the name of the proposed Principal Senior Facilitator and Alternate Senior Facilitator and clearly identify in its proposal which individual is the Principal Senior Facilitator and which is the Alternate Senior Facilitator.</p>	<input type="checkbox"/> Met  <input type="checkbox"/> Not Met
S-M2	<p><b>Experience Facilitating Events</b></p> <p>The proposed Senior Facilitators (Principal and Alternate) must each have a minimum of ten years of experience facilitating events within the past fifteen years.</p> <p>One year of experience facilitating events is considered to be when the resource facilitates a minimum of 20 events during the course of a calendar year whereby each event is a minimum of three hours with a minimum of ten participants. Facilitating an event includes planning, designing, organizing, and conducting the event.</p> <p><b>Submission Requirement</b> The Offeror must demonstrate that each proposed Senior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources’ experience and by providing project descriptions for one event for each of the ten years of experience (ten project descriptions) demonstrating the noted experience obtained within the time period specified above. Each of the ten project descriptions must include the following:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates of each event facilitated</li> <li>(d) Duration of each event facilitated</li> <li>(e) Brief description of the facilitation work performed</li> </ul>	<input type="checkbox"/> Met  <input type="checkbox"/> Not Met
S-M3	<b>Experience Facilitating Town Halls or Events for Political Parties or</b>	<input type="checkbox"/> Met

#	Mandatory Technical Evaluation Criteria	Scoring Methodology
	<p><b>Senior Executives</b></p> <p>The proposed Senior Facilitators (Principal and Alternate) must each have experience facilitating a minimum of 20 events with representatives of federal, provincial, territorial or municipal political parties or with senior executives from the public and private sectors or following a Town Hall format, within the past five years, whereby each event is a minimum of three hours with a minimum of ten participants.</p> <p>Facilitating an event includes, at a minimum, planning, designing, organizing, and conducting the event.</p> <p><b>Submission Requirement</b></p> <p>The Offeror must demonstrate that each proposed Senior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources’ experience and by providing five project descriptions demonstrating the noted experience obtained within the time period specified above. Each of the five project descriptions must include the following:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates of each event facilitated</li> <li>(d) Duration of each event facilitated</li> <li>(e) Description of event attendees</li> <li>(f) Brief description of the facilitation work performed</li> </ul>	<input type="checkbox"/> Not Met
S-M4	<p><b>Experience Managing Conflicts</b></p> <p>The proposed Senior Facilitators (Principal and Alternate) must each have experience managing conflicts and/or situations involving polarized viewpoints in an open forum setting.</p> <p><b>Submission Requirement</b></p> <p>The Offeror must demonstrate that each proposed Senior Facilitator meets the requirement by completing two Client Reference Templates – Template B per proposed Senior Facilitator.</p> <p>The two Client Reference Templates submitted in response to S-M4 will be further rated at S-R3.</p>	<input type="checkbox"/> Met  <input type="checkbox"/> Not Met



#	Mandatory Technical Evaluation Criteria	Scoring Methodology
S-M5	<p><b>Official Languages</b></p> <p>Each of the proposed Senior Facilitators must be able to perform the totality of the Work in both official languages, in particular with regards to communicating orally, reading and understanding text in both French and English, at an advanced level, and with regards to capturing notes in both French and English.</p> <p><b>Submission Requirement</b></p> <p>The Offeror must demonstrate that each proposed Senior Facilitator meets the requirement by certifying in Part 9 – Certificates the proposed resources' capabilities and by providing the name and contact information of one client reference per Senior Facilitator that can attest to the proposed Facilitators' experience facilitating events bilingually, in both official languages. The client reference must attest to the proposed Facilitators' capabilities with regards to reading and speaking in French and English, at an advanced level, and with regards to capturing notes in both French and English.</p> <p>For each client reference, the Offeror must provide the following:</p> <ul style="list-style-type: none"> <li>(d) Name of the client contact</li> <li>(e) Name of the client organization</li> <li>(f) Telephone number and/or email address of the client contact</li> </ul>	<p><input type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>

**TABLE C – RATED TECHNICAL EVALUATION CRITERIA (JUNIOR FACILITATORS)**

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
J-R1	<p><b>Experience Facilitating Large Events – Principal and Alternate</b></p> <p>The proposed Junior Facilitators should each have experience facilitating large events. A large event requires that a minimum of 50 people were in attendance and that the duration was two full Business Days.</p> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Junior Facilitators meet the requirement by providing project descriptions (maximum of three per Junior Facilitator) with the following information:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates (month-year format)</li> <li>(d) Number of event attendees</li> <li>(e) Brief description of the work performed</li> </ul> <p><b>Scoring Methodology</b> The Offeror will receive five points per event of clearly demonstrated experience in the criterion described above.</p>	15
J-R2	<p><b>Facilitation Approach *CRITERION ONLY REQUIRED FOR THE PRINCIPAL JUNIOR FACILITATOR*</b></p> <p>The proposed Principal Junior Facilitator should detail his or her proposed facilitation approach which demonstrates a thorough understanding of the Work required for a Meeting.</p> <p>The proposed Principal Junior Facilitator’s facilitation approach should include, at a minimum, the following information:</p> <ul style="list-style-type: none"> <li>i. Methodology for developing a meeting agenda, detailed design and supporting materials to ensure all relevant topics are covered and that the appropriate approach is used for each topic</li> <li>ii. Methodology for ensuring and confirming participant understanding during a Meeting</li> <li>iii. Methodology for encouraging discussion during a Meeting</li> <li>iv. Methodology for identifying key messages during a Meeting</li> </ul> <p><b>Submission Requirement</b> In a maximum of 1,500 words, the proposed Principal Junior Facilitator</p>	30

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>must detail his or her proposed facilitation approach, specifically with regards to methodologies i to iv, above. The proposed Principal Junior Facilitator should specify what differing facilitation approach will be used in the following circumstances:</p> <ul style="list-style-type: none"> <li>(a) When the topic at hand is sensitive or emotionally charged</li> <li>(b) When a consensus is required</li> <li>(c) When the topic is related to change management</li> </ul> <p><b>Scoring Methodology</b> The Offeror will receive up to 30 points as follows:</p> <ul style="list-style-type: none"> <li>• 30 points <b>(Comprehensively Addressed)</b>: The response demonstrates an excellent understanding of the EC requirements and the proposed approach addresses all important factors (i to iv and a to c, above). The response has no apparent weaknesses, appears likely to meet requirements, be effective and yield excellent results.</li> <li>• 20 points <b>(Adequately Addressed)</b>: The response demonstrates adequate understanding of the EC requirements and addresses most factors (i to iv and a to c, above). The response has minor weaknesses and appears likely to meet requirements and be effective.</li> <li>• 10 points <b>(Minimally Addressed)</b>: The response demonstrates limited understanding of the EC requirements and addresses some important factors (i to iv and a to c, above). The response has weaknesses and does not appear likely to meet requirements or be effective.</li> <li>• 0 points <b>(Not Addressed)</b>: The response is not relevant to the criterion or does not sufficiently address the requirement to be awarded points.</li> </ul>	
J-R3	<p><b>Experience Facilitating Using Modern Communication Technologies – Principal and Alternate</b></p> <p>The proposed Junior Facilitators should each have experience facilitating events enhanced by modern communication technologies including the following:</p> <ul style="list-style-type: none"> <li>i. Videoconferencing</li> <li>ii. Teleconferencing</li> <li>iii. Online chat forums</li> <li>iv. Facilitation software</li> </ul>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>v. Social media</p> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Junior Facilitators meet the requirement by providing project descriptions (maximum of <del>two</del> <u>five</u> per Junior Facilitator) with the following information:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates (month-year format)</li> <li>(d) List of which modern communication technologies were used (i to v above)</li> <li>(e) Brief description of the modern communication technology used and how it was managed by the Facilitator</li> </ul> <p><b>Scoring Methodology</b> For each project description, the Offeror will receive one point per modern communication technology used up to a maximum of <del>five</del> <u>two</u> points per project description and ten points per Junior Facilitator. <u>Offerors will receive a maximum of two points per modern communication technology.</u></p>	
J-R4	<p><b>Professional Qualifications – Principal and Alternate</b></p> <p>The proposed Junior Facilitators should each hold a current professional qualification or education degree from the following:</p> <ul style="list-style-type: none"> <li>i. Relevant degree or diploma from a recognized post-secondary institution;</li> <li>ii. Certified Training and Development Professional (CTDP);</li> <li>iii. Association for Challenge Course Technology (ANSI);</li> <li>iv. Certified Online Facilitation;</li> <li>v. Certified Professional Facilitator; or</li> <li>vi. Certified Master Facilitator.</li> </ul> <p><b>Submission Requirement</b> The Offeror must demonstrate that the proposed Junior Facilitators meet the requirement by providing a copy of the proposed Junior Facilitators' qualification(s).</p> <p><b>Scoring Methodology</b> The Offeror will receive up to 10 points per Junior Facilitator as follows:</p>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<ul style="list-style-type: none"> <li>• 10 points (i.e. full points): proposed Junior Facilitator has three qualifications or degrees from the list above (i to vi).</li> <li>• 7 points: proposed Junior Facilitator has two qualifications or degrees from the list above (i to vi).</li> <li>• 4 points: proposed Junior Facilitator has one qualification or degree from the list above (i to vi).</li> <li>• 0 points: proposed Junior Facilitator has no qualification or degree from the list above.</li> </ul>	

<b>SUMMARY – JUNIOR FACILITATORS RATED TECHNICAL EVALUATION</b>	
MAXIMUM PRINCIPAL JUNIOR FACILITATOR TOTAL SCORE Minimum Pass Mark – Principal Junior Facilitator (70%) = 46 Points	65
MAXIMUM ALTERNATE JUNIOR FACILITATOR TOTAL SCORE Minimum Pass Mark – Alternate Junior Facilitator (70%) = 25 Points	35
<b>TOTAL JUNIOR FACILITATOR SCORES</b>	<b>100</b>

**TABLE D – RATED TECHNICAL EVALUATION CRITERIA (SENIOR FACILITATORS)**

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
S-R1	<p><b>Experience Facilitating Large Events – Principal and Alternate</b></p> <p>The proposed Senior Facilitators should each have experience facilitating large events. A large event requires that a minimum of 50 people were in attendance and that the duration was two full Business Days.</p> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Senior Facilitators meet the requirement by providing project descriptions (maximum of three per Senior Facilitator) with the following information:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates (month-year format)</li> <li>(d) Number of event attendees</li> <li>(e) Brief description of the work performed</li> </ul> <p><b>Scoring Methodology</b> The Offeror will receive five points per event of clearly demonstrated experience in the criterion described above.</p>	15
S-R2	<p><b>Experience Facilitating Town Halls – Principal and Alternate</b></p> <p>The proposed Senior Facilitators should have experience facilitating Town Halls and managing the challenges unique to such events. The Town Hall event facilitated must have been a minimum of three hours with a minimum of ten participants.</p> <p>Facilitating an event includes, at a minimum, planning, designing, organizing, and conducting the event.</p> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Senior Facilitators have the experience listed above by providing descriptions (maximum of two descriptions per Senior Facilitator) that include the following:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates of the event facilitated</li> <li>(d) Brief description of the facilitation work performed</li> <li>(e) Brief description of the challenges encountered specific to</li> </ul>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>facilitating a Town Hall and how the facilitator managed/overcame the challenges</p> <p><b>Scoring Methodology</b> The Offeror will receive up to five points per project description as follows:</p> <ul style="list-style-type: none"> <li>• 5 points: The project description includes challenges unique to Town Halls and clearly demonstrates that the challenges were managed in an effective manner.</li> <li>• 3 point: The project description includes limited challenges with minor weaknesses or gaps in the demonstration of how the challenges were managed.</li> <li>• 1 point: The project description includes limited challenges. The description of how the challenges were managed appears unlikely to be effective.</li> <li>• 0 points: The project description is not relevant to the criterion or does not sufficiently address the requirement to be awarded points.</li> </ul>	
S-R3	<p><b>Experience Managing Conflicts – Principal and Alternate</b></p> <p>As submitted in response to S-M4, the proposed Senior Facilitators should have experience managing conflicts and/or situations involving polarized viewpoints in an open forum setting.</p> <p><b>Submission Requirement</b> Using the Client Reference Templates submitted in response to SM-4, the Offeror should demonstrate that the proposed Senior Facilitators have the experience listed above by providing a brief description of the conflict(s) and how the proposed Senior Facilitator managed the conflict.</p> <p><b>Scoring Methodology</b> The Offeror will receive up to five points per Client Reference as follows:</p> <ul style="list-style-type: none"> <li>• 5 points: The response addresses all factors with no apparent weaknesses or gaps. The conflict management approach appears effective and likely to yield excellent results.</li> <li>• 3 points: The response addresses most factors and has minor weaknesses or gaps. The conflict management approach appears effective.</li> <li>• 1 point: The response addresses some factors and has weaknesses or gaps. The conflict management approach does not appear likely</li> </ul>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>to be effective.</p> <ul style="list-style-type: none"> <li>0 points: The response is not relevant to the criterion or does not sufficiently address the requirement to be awarded points.</li> </ul>	
S-R4	<p><b>Experience Leading Decision Making Process with Financial Components – Principal and Alternate</b></p> <p>The proposed Senior Facilitators should have experience leading decision making processes with strong financial components including investment planning decision, cost reduction and program review.</p> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Senior Facilitators meet the requirement by providing project descriptions (maximum of five per Senior Facilitator) with the following information:</p> <ul style="list-style-type: none"> <li>(a) Name of the client organization</li> <li>(b) Event title or topic</li> <li>(c) Start and end dates (month-year format)</li> <li>(d) Brief description of the work performed including the financial components considered</li> </ul> <p><b>Scoring Methodology</b> The Offeror will receive 2 points per event of clearly demonstrated experience in the criterion described above.</p>	10
S-R5	<p><b>Facilitation Approach *CRITERION ONLY REQUIRED FOR THE PRINCIPAL SENIOR FACILITATOR*</b></p> <p>The proposed Principal Senior Facilitator should detail his or her proposed facilitation approach which demonstrates a thorough understanding of the Work required for a Meeting.</p> <p>The proposed Principal Senior Facilitator’s facilitation approach should include, at a minimum, the following information:</p> <ul style="list-style-type: none"> <li>i. Methodology for developing a meeting agenda, detailed design and supporting materials to ensure all relevant topics are covered and that the appropriate approach is used for each topic</li> <li>ii. Methodology for ensuring and confirming participant understanding during a Meeting</li> <li>iii. Methodology for encouraging discussion during a Meeting</li> </ul>	30



#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>iv. Methodology for identifying key messages during a Meeting</p> <p><b>Submission Requirement</b> In a maximum of 1,500 words, the proposed Principal Senior Facilitator must detail his or her proposed facilitation approach, specifically with regards to methodologies i to iv, above. The Principal Facilitator should specify what differing facilitation approach will be used in the following circumstances:</p> <p>(a) When the topic at hand is sensitive or emotionally charged (b) When a consensus is required (c) When the topic is related to change management</p> <p><b>Scoring Methodology</b> The Offeror will receive up to 30 points as follows:</p> <ul style="list-style-type: none"> <li>• 30 points <b>(Comprehensively Addressed)</b>: The response demonstrates an excellent understanding of the EC requirements and the proposed approach addresses all important factors (i to iv and a to c, above). The response has no apparent weaknesses, appears likely to meet requirements, be effective and yield excellent results.</li> <li>• 20 points <b>(Adequately Addressed)</b>: The response demonstrates adequate understanding of the EC requirements and addresses most factors (i to iv and a to c, above). The response has minor weaknesses and appears likely to meet requirements and be effective.</li> <li>• 10 points <b>(Minimally Addressed)</b>: The response demonstrates limited understanding of the EC requirements and addresses some important factors (i to iv and a to c, above). The response has weaknesses and does not appear likely to meet requirements or be effective.</li> <li>• 0 points <b>(Not Addressed)</b>: The response is not relevant to the criterion or does not sufficiently address the requirement to be awarded points.</li> </ul>	
S-R6	<p><b>Experience Facilitating Using Modern Communication Technologies – Principal and Alternate</b></p> <p>The proposed Senior Facilitators should each have experience facilitating meetings enhanced by modern communication technologies including the following:</p>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<ul style="list-style-type: none"> <li>• Videoconferencing</li> <li>• Teleconferencing</li> <li>• Online chat forums</li> <li>• Facilitation software</li> <li>• Social media</li> </ul> <p><b>Submission Requirement</b> The Offeror should demonstrate that the proposed Senior Facilitators meet the requirement by providing project descriptions (maximum of <del>two</del> <u>five</u> per Senior Facilitator) with the following information:</p> <ul style="list-style-type: none"> <li>• Name of the client organization</li> <li>• Event title or topic</li> <li>• Start and end dates (month-year format)</li> <li>• List of which modern communication technologies were used (i to v above)</li> <li>• Brief description of the modern communication technology used and how it was managed by the Facilitator</li> </ul> <p><b>Scoring Methodology</b> For each project description, the Offeror will receive one point per modern communication technology used up to a maximum of <del>five</del> <u>two</u> points per project description and ten points per Senior Facilitator. <u>Offerors will receive a maximum of two points per modern communication technology.</u></p>	
S-R7	<p><b>Professional Qualifications – Principal and Alternate</b></p> <p>The proposed Senior Facilitators should hold a current professional qualification or education degree from the following:</p> <ol style="list-style-type: none"> <li>i. Degree or diploma from a recognized post-secondary institution;</li> <li>ii. Certified Training and Development Professional (CTDP);</li> <li>iii. Association for Challenge Course Technology (ANSI);</li> <li>iv. Certified Online Facilitation;</li> <li>v. Certified Professional Facilitator; or</li> <li>vi. Certified Master Facilitator.</li> </ol> <p><b>Submission Requirement</b> The Offeror must demonstrate that the proposed Senior Facilitators meet the requirement by providing a copy of the proposed Senior Facilitators’</p>	10

#	Rated Technical Evaluation Criteria	Maximum Points per Facilitator
	<p>qualification(s).</p> <p><b>Scoring Methodology</b> The Offeror will receive up to 10 points per Senior Facilitator as follows:</p> <ul style="list-style-type: none"> <li>• 10 points (i.e. full points): proposed Senior Facilitator has three qualifications or degrees from the list above (i to vi).</li> <li>• 7 points: proposed Senior Facilitator has two qualifications or degrees from the list above (i to vi).</li> <li>• 4 points: proposed Senior Facilitator has one qualification or degree from the list above (i to vi).</li> <li>• 0 points: proposed Senior Facilitator has no qualification or degree from the list above.</li> </ul>	

<b>SUMMARY – SENIOR FACILITATORS RATED TECHNICAL EVALUATION</b>	
MAXIMUM PRINCIPAL SENIOR FACILITATOR TOTAL SCORE Minimum Pass Mark – Principal Senior Facilitator (70%) = 67 Points	95
MAXIMUM ALTERNATE SENIOR FACILITATOR TOTAL SCORE Minimum Pass Mark – Alternate Senior Facilitator (70%) = 46 Points	65
<b>TOTAL SENIOR FACILITATOR SCORES</b>	<b>160</b>

**TEMPLATE A – IDENTIFICATION OF SERVICES**

<b>Name of Offeror</b>	
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<b>Categories of Service</b>
<p>Indicate with an “x” the Services for which you are submitting a proposal.</p> <p style="text-align: center;"> <input type="checkbox"/> Facilitation Services – Junior   <input type="checkbox"/> Facilitation Services – Senior         </p>

<b>Facilitation Services – Junior</b>	
If you are submitting a proposal for Facilitation Services – Junior, please complete the following:	
<b>Principal Junior Facilitator:</b>	
<b>Alternate Junior Facilitator:</b>	

<b>Facilitation Services – Senior</b>	
If you are submitting a proposal for Facilitation Services – Senior, please complete the following:	
<b>Principal Senior Facilitator:</b>	
<b>Alternate Senior Facilitator:</b>	

**TEMPLATE B – CLIENT REFERENCE TEMPLATE**

To be filled out in response to criterion S-M4

CLIENT REFERENCE TEMPLATE		
<b>Offeror Name:</b>		
<b>Proposed Senior Facilitator:</b>		
<b>Client Identification</b>	<b>Event Title</b>	
	<b>Client Organization Name</b>	
	<b>Client Contact Name</b>	
	<b>Client Contact Title</b>	
	<b>Client Contact Information</b> (Email or Telephone)	
<b>Event description</b> (maximum of 100 words)		
<b>Description of proposed Senior Facilitator’s experience managing conflict</b> (Include a brief description of the conflict(s) and how the proposed Senior Facilitator managed the conflict)		