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## PART 1 – GENERAL INFORMATION

### 1. Introduction

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

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

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

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

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

**Part 5 Certifications:** includes the certifications to be provided;

**Part 6 Security, Financial and Other Requirements:** includes specific requirements that must be addressed by bidders; and

**Part 7 Resulting Contract Clauses:** includes the clauses and conditions that will apply to any resulting contract.

The Annexes include:

**Annex "A"** - the Statement of Work

**Annex "B"** - the Basis of Payment

and any other annexes.

### 2. Summary

By means of the RFP, NRCan is seeking proposals from Bidders who would effectively take over the hosting operation and maintenance of the Equipment Division Contact Database (EDCDB). Maintenance would include the following types of activities such as user support, training for ED staff on updates, trouble shooting, looking after the overall functionality of the database, assistance in keeping contacts data current (bounce backs), and managing the systems connecting with the database (Click Dimension and external website interface) and their licenses

#### 2.1 Security Requirement

There is no security requirements associated with either of these requirements and any resulting contract(s).

#### 2.2 Trade Agreements

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-Chile Trade Agreement, the Canada-Colombia Trade Agreement, the Canada-Panama Trade Agreement, the Canada-Peru Trade Agreement the Canada-Honduras Free Trade Agreement and Agreement on Internal Trade (AIT)



### **3. Debriefings**

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



## PART 2 – BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

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

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

**The 2003 (2016-04-04), Standard Instructions - Goods or Services - Competitive Requirements**, are incorporated by reference into and form part of the bid solicitation with the modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

#### In the complete text content (except Section 1 – Integrity Provisions – Bid):

DELETE: Public Works and Government Services Canada (PWGSC)

INSERT: Natural Resources Canada (NRCan)

#### In Section 2 – Procurement Business Number:

DELETE: “Suppliers are required to”

INSERT: “It is suggested that suppliers”

#### In Section 5.4 – Submission of Bids:

DELETE: sixty (60) days

INSERT: one hundred and twenty (120) days

#### In Section 8.1 – Transmission by Facsimile:

DELETE: 819-997-9776

INSERT: 613-992-2920

#### In Section 20.2 – Further Information:

DELETE: in its entirety

### 2. Submission of Bids

It is the Bidders responsibility to ensure that proposals are delivered to the following location, by the time and date indicated on page 1 of this RFP document:

Natural Resources Canada  
Bid Receiving Unit – Loading Dock Access  
588 Booth Street, Room 108  
Ottawa, Ontario K1A 0Y7  
Attention: **Valerie Holmes**

It is requested that the Bidder’s name, return address, Request for Proposal Number, and Bid Closing Date appear legibly on the outside of the envelope containing the Bidder’s proposal. Failure to do so may result in bids being misdirected. **NRCan will not assume responsibility for proposals directed to any other location.**

The onus is on the Bidder to ensure that the proposal is delivered to the location above. Not complying with the above instructions may result in NRCan’s inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.



- 2.1 Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to NRCan will not be accepted.

### **3. Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than **seven (7)** calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

### **4. Applicable Laws**

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

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

### **5. Improvement of Requirement During Solicitation Period**

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.

### **6. Basis for Canada's Ownership of Intellectual Property**

Natural Resources Canada has determined that there will not be any intellectual property produced under this requirement.



## PART 3 – BID PREPARTION INSTRUCTIONS

### 1. Bid Preparation Instructions

NRCan will accept your bids in one of the following formats:

#### HARD COPY:

**Section I:** Technical Bid – 4 copies (1 original, 3 copies)

**Section II:** Financial Bid - 1 copy, **under separate cover**. Prices related to the current solicitation must appear in the financial bid only and are not to be indicated in any other section of the bid; prices referenced in the financial bid should not to be repeated in any other section of the bid.

**Section III:** Certifications – 1 copy

Natural Resources Canada encourages the use of recycled paper and **two-sided printing**. Reduction in the size of documents will contribute to Natural Resources Canada’s sustainable development initiatives and reduce waste.

OR:

In support of the Policy on Green Procurement, it is requested that bidders provide their bid as follows:

#### ELECTRONIC STORAGE MEDIA:

Since NRCan is working towards a greener environment by eliminating all hard copy file folders, we prefer to have all bids on a CD/DVD or USB. If you wish to submit in this format, please provide the following:

**Section I:** Technical Bid – 4 copies (1 original, 3 copies)

**NOTE:** 1 CD/DVD/USB will contain: 1 Technical, sole Financial Bid, Certifications and signed first page (Original)  
3 CD/DVD/USB will contain: just the Technical Bid

**Section II:** Financial Bid - 1 copy (included with original Technical Bid).

**Section III:** Certifications – 1 copy (included with original Technical Bid and sole Financial Bid)

**Note:** NRCan will accept either Hard copy or Electronic Storage Media submitted bids. However, it is NRCan’s preference that you submit using Electronic Storage Media in order to adhere to our green initiative.

**NOTE: WHEN SUBMITTING A BID TO THIS SOLICITATION AND YOU USE A COURIER SERVICE, YOU ARE ADVISED TO WRITE THE BID SOLICITATION NUMBER, CLOSING DATE AND TIME ON THE FRONT OF THE COURIER PACKAGE; NOT JUST ON THE ENVELOPES WITHIN THE COURIER PACKAGE IN ORDER TO AVOID ANY UNCERTAINTY FROM OUR BID RECEIPT UNIT WHEN RECEIVING BIDS WITHOUT ANY INDICATION WHAT THEY ARE FOR.**

No payment shall be made for costs incurred by the Bidder in the preparation and submission of a proposal in response to this RFP.

To assist Canada in reaching its objectives, bidders are encouraged to:

- i. use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and





- ii. use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.
- iii. use a numbering system that corresponds to the bid solicitation.

### **1. Section I: Technical Bid**

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders must demonstrate their capability and describe their approach in a thorough, concise and clear manner for successfully carrying out the work as described in the Annex "A" – Statement of Work".

Bidders must respond to government bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the bid or contract documents, and submit bids and enter into contracts only if they will fulfill all obligations of the contract.

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

It is the responsibility of the Bidder to obtain clarification of the requirements contained in the RFP, if necessary, prior to submitting a proposal. The Bidder must provide sufficient details in its proposal to substantiate compliance with what is required; all professional experience must be fully documented and substantiated in the proposal(s).

In the event of a proposal submitted through contractual joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture. (All members of the joint venture shall be jointly and severally or solidarily liable for the performance of any resulting contract awarded as a result of a joint venture.)

### **2. Page 1 of the RFP Document**

It is mandatory that all bidders sign their submitted proposal. It is requested that all bidders complete, sign and date Page 1 of this RFP (including the name of the submitting organization, the name of the authorized signing person, appropriate addresses, telephone and facsimile numbers and business contact) when submitting their proposal. As the signature indicates a clear acceptance of the terms and conditions set out in the RFP, it is the Bidder's responsibility to ensure that the signatory has the authority within its organization to commit the Bidder by making such a contractual offer.

As per article 1 of Part 2, the Bidder hereby agrees, by submitting his/her proposal in response to this RFP, to all the instructions, terms, conditions and clauses detailed herein.

### **3. Section II: Financial Bid**

Bidders must submit their financial bid in accordance with Annex "B"- Financial Proposal at the pre-determined rates provided. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

All bids are evaluated in Canadian currency. Therefore, for evaluation purposes, the noon rate quoted by the Bank of Canada as being in effect on date of bid closing will be applied as the initial conversion factor for the specified currency.



Canada will pay the exchange rate adjustment amount in Canadian currency using the prevailing noon rate on the date of payment by Canada.

**3.1 Exchange Rate Fluctuation**

C3011T (2013-11-06), Exchange Rate Fluctuation

**4. Section III: Certifications**

Bidders must submit the certifications as per Part 5.



## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

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

#### 1.1 Mandatory Technical Evaluation

Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
<b>M1: Setup an Intranet Website:</b>			
The Supplier will maintain a secure Intranet website which would allow authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required. The Supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M1.1</b>	The Bidder <b>MUST</b> ensure that the site will provide the contact with the option of working in either official language, with the ability to switch back and forth between them.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M2: On-Going Services – Self Service Web Public Website:</b>			
The supplier will maintain a secure Internet website which allows members of the public to sign up for email communications from NRCan, including the ability to select their special areas of interest. The supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M2.1</b>	The Bidder <b>MUST</b> provide continued hosting, maintenance and backup of the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M3: Intranet Website:</b>			
The supplier will support a secure Intranet website which allows authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required. The Supplier will be responsible for hosting, maintenance and backup of the system.			
<b>M3.1</b>	The Bidder <b>MUST</b> provide continued hosting, maintenance and backup of the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M4: Maintenance of Access Control Lists:</b>			
The Access Control Lists (ACL) will be used to determine what privileges will be allocated to the users of the system.			
<b>M4.1</b>	The Bidder <b>MUST</b> allow NRCan to create and maintain NRCan users who can initiate email list usage and review the results of the email campaigns.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M5: Email List Usage:</b>			
The primary purpose of the system is the ability to send emails on demand to a targeted group of interested contacts.			
<b>M5.1</b>	The Bidder <b>MUST</b> allow NRCan to initiate an email campaign to a selected set of contacts based on one (1) or more of the contact fields, and/or contacts from Participant Agreements based on fields in the PA Table. The campaign should including the following characteristics: <ul style="list-style-type: none"> <li>• All email campaigns should be compliant with Canada's</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<p>anti-spam legislation (CASL), including the ability to unsubscribe from the lists.</p> <ul style="list-style-type: none"> <li>• An NRCan user or administrator should be able to initiate and carry out a campaign without any action required from the Supplier.</li> <li>• NRCan should be able to create the copy text for the email, which could include embedded HTML (for links or graphics).</li> <li>• NRCan should be able to select a set of recipients based on fields from the database (including lookups, interest area, groups, geography, company, etc.)</li> <li>• NRCan should be able to run a test email for a campaign to a small set of addresses to verify the campaign.</li> <li>• NRCan should be able to schedule a campaign to run at a particular date and time.</li> </ul>		
<b>M5.2</b>	<p>The Bidder <b>MUST</b> allow NRCan to review results of the campaign including:</p> <ul style="list-style-type: none"> <li>• The number of emails sent out</li> <li>• The number of emails opened</li> <li>• The number of emails bounced</li> <li>• The number of emails whose links were clicked on</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6: Email List Maintenance for Organizations or Contacts:</b>			
The Supplier would be responsible for updates to the content of the database based on requests by NRCan.			
<b>M6.1</b>	<p>The Bidder <b>MUST</b> allow NRCan to create new records or update existing records in the contact or participant areas of the database.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6.2</b>	<p>The Bidder <b>MUST</b> be able to make additions or updates to the content area of the database. These requests could be made by any of the following methods:</p> <ul style="list-style-type: none"> <li>• An email request forwarded to the Supplier which includes the information to be added or updated in the database.</li> <li>• NRCan could forward a vCard file for import</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M6.3</b>	<p>The Bidder <b>MUST</b> respond to campaign results for bounced addresses with a process to notify NRCan and resolve the items.</p> <ul style="list-style-type: none"> <li>• A work list should be available to NRCan for all key contacts<sup>1</sup> whose email address bounces.</li> <li>• A work list should be available to NRCan for all non-key contacts whose email address bounces.</li> <li>• A work list should be available to NRCan for all key contacts who have unsubscribed from the lists. After contacting the subscriber, a process should exist to reinstate the contact, if appropriate.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<sup>1</sup> Key Contacts are based on a field in the Contacts table, or for contacts that re listed in the participant's agreements



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
<b>M7: Notifications of Special Conditions:</b>			
The Supplier will create work lists on the Intranet site that alert NRCan to conditions that require action. These work lists will be discussed as needed.			
<b>M7.1</b>	<p>The Bidder <b>MUST</b> be able to identify the following:</p> <ul style="list-style-type: none"> <li>• missing key contact for participant agreements;</li> <li>• no email address for key contacts;</li> <li>• no name for key contacts;</li> <li>• bounces or unsubscribes for key contacts;</li> <li>• Missing NRCan contact (from either data entry issues, or personnel changes where an NRCan employee is no longer on the list of NRCan contacts);</li> <li>• Duplicate entries with the same email address;</li> <li>• Organizational names that are similar, at the same or similar address;</li> <li>• The work lists can be exported in tab delimited format.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M8: Email List Verification:</b>			
In an effort to keep the content of the database current, the Supplier will initiate an annual verification of the contents of the contact database with each contact in the system.			
<b>M8.1</b>	The Bidder <b>MUST</b> work with NRCan to develop an email campaign to request that contacts verify their own information.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M8.2</b>	The Bidder <b>MUST</b> email all current subscribers with their current information, and a link providing them the option to update their information.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M8.3</b>	The Bidder <b>MUST</b> provide an option for special campaigns to run for renewals in specific topic areas based on upcoming events or changes to regulations or standards.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M9: Areas of Lookup List Maintenance:</b>			
In order to allow for the selection of data sets for campaigns to be more consistent, certain fields will be completed from drop-down lists (radio buttons or similar interface elements). These lists will be maintained in the database, and accessible by NRCan for creation or updates.			
<b>M9.1</b>	The Bidder <b>MUST</b> allow NRCan to update the content of all the lookup lists used on the Internet and Intranet websites.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M10: Business Intelligence:</b>			
The demographic information contained in both the Contacts and Participant Agreement section of the database will allow for business intelligence reports to help NRCan understand the impact that the programs are having.			
<b>M10.1</b>	<p>The Bidder <b>MUST</b> be able to provide the following:</p> <ul style="list-style-type: none"> <li>• Reports for email campaigns (as mentioned above);</li> <li>• Reports of the contacts, with a selection allowed by any of the lookup fields;</li> <li>• Reports of the organization, with a selection allowed by any of the lookup fields;</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<ul style="list-style-type: none"> <li>Reports of the Participant Agreements, with a selection allowed by any of the lookup fields.</li> <li>Various demographic reports on the organizations and Contacts in the system including:               <ul style="list-style-type: none"> <li>Count of current organizations/contacts by province;</li> <li>Count of current organizations/contacts by product interest area by province;</li> <li>Count of current organizations/contacts of "signed up" by year;</li> <li>Trends.</li> </ul> </li> </ul>		
<b>M11: Data Exports:</b>			
NRCan requires the ability to export the full data set, as well as subsets of data for additional analysis or processing.			
<b>M11.1</b>	<p>The Bidder <b>MUST</b> be able to conduct a wide variety of tasks that may including but not limited to the following:</p> <ul style="list-style-type: none"> <li>The Intranet site will provide the option for administrators to export the full set of data on demand;</li> <li>The Intranet site will provide the option for administrators to export a subset of data on demand. The data export could be for the following conditions:               <ul style="list-style-type: none"> <li>Only include exports that will be used regularly, the rest could be requested as special, then included in the menus, if needed</li> </ul> </li> <li>Include all fields, or only selected fields;</li> <li>Exports in tab delimited format.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

**1.2 Point Rated Technical Criteria**

Point Rated Requirements:				
Item	Requirement	Points Breakdown	Max Points	Illustrated Compliance
<b>R1: Registration Website:</b>				
<b>R1.1</b>	The Bidder has provided details on the maintenance of similar database	1 – 2 projects 10 3 – 4 projects 20 ≥5 projects 30	<b>30</b>	
<b>R1.2</b>	The Bidder has experience maintaining data security and privacy in accordance with the Treasury Board guidelines ( <a href="http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp">http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp</a> and <a href="http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp">http://www.tbs-sct.gc.ca/pubs_pol/gospubs/tbm_128/siglist-eng.asp</a> ) with similar systems.	1 – 2 projects 10 3 – 4 projects 20 ≥5 projects 30	<b>30</b>	
<b>R1.3</b>	The Bidder has the ability to allow the import of a vCard to seed the entries	Yes 5 No 0	<b>5</b>	
<b>R1.4</b>	The Bidder has CATCHA or a similar system to reduce the likelihood of registration by netbots. Proof to be provided	1 – 2 projects 10 3 – 4 projects 20 ≥5 projects 30	<b>30</b>	



<b>Point Rated Requirements:</b>					
<b>Item</b>	<b>Requirement</b>	<b>Points Breakdown</b>		<b>Max Points</b>	<b>Illustrated Compliance</b>
<b>R1.5</b>	The Bidder has put in place processes to identify and handle duplicate registration.	Yes	5	<b>5</b>	
		No	0		
<b>R1.6</b>	The Bidder will provide a service level agreement	<b>10 points:</b> SLA complete		<b>10</b>	
		<b>5 points:</b> SLA missing key factors			
		<b>0 points:</b> SLA not acceptable			
<b>Total Points Available for R1:</b>				<b>110</b>	
<b>Total Points Needed to be Considered Compliant (60%)</b>				<b>66</b>	
<b>R2: Intranet Website:</b>					
<b>R2.1</b>	The Bidder has provided details on the maintenance of similar solutions	1 – 2 projects	10	<b>30</b>	
		3 – 4 projects	20		
		≥5 projects	30		
<b>R2.2</b>	The Bidder will provide a service level agreement	<b>10 points:</b> SLA complete		<b>10</b>	
		<b>5 points:</b> SLA missing key factors			
		<b>0 points:</b> SLA not acceptable			
<b>Total Points Available for R2:</b>				<b>40</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R2:</b>				<b>24</b>	
<b>R3: Orientation and Documentation</b>					
<b>R3.1</b>	The Bidder has provided support services in both official languages (English/French) for similar systems.  If possible, the Bidder is to provide examples or references.	Yes	10	<b>10</b>	
		No	0		
<b>Total Points Available for R3:</b>				<b>10</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R3:</b>				<b>6</b>	
<b>R4: Email List Usage:</b>					
<b>R4.1</b>	The Bidder has the ability to duplicate the content of a previous campaign as the starting point for a new campaign.	Yes	5	<b>5</b>	
		No	0		
<b>Total Points Available for R4:</b>				<b>5</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R4:</b>				<b>3</b>	
<b>R5: Business Intelligence</b>					
<b>R5.1</b>	The Bidders systems should be able to provide graphic representation of reports. (Max 30 points)  Note to Bidders: If your current system is able to provide the above, please provide a screen shot.	<b>Graphic representation of report (20 points maximum):</b> <b>20 points:</b> Bidder's system currently provides chart (bar, pie, trend lines) <b>10 points:</b> Bidder's system can be programmed to provide this detail <b>5 points:</b> Bidder's system can be shown graphically in tubular format <b>0 points:</b> Bidder's system		<b>20</b>	



Point Rated Requirements:					
Item	Requirement	Points Breakdown		Max Points	Illustrated Compliance
		cannot provide this detail			
<b>R5.2</b>	<p>The Bidders systems should be able to provide an accumulation of trend data for all the mandatory reports (reports for each campaign would normally be presented individually (i.e. total number of emails sent, total opened, total click through, total bounces) (Max 25 points)</p> <p>Note to Bidders: If your current system is able to provide the above, please provide a screen shot.</p>	<p><b>Trend Data (total 20 points max):</b>  <b>20 points:</b> Bidder's system currently provides reports that would span multiple campaigns in order to understand the trend for that style campaign over the past usages  <b>10 points:</b> Bidder's system can be programmed to provide this detail  <b>0 points:</b> Bidder's system cannot provide this detail</p>		<b>20</b>	
<b>R5.3</b>	<p>The Bidders systems should be able to provide exports of data from reports (the reports would be provided on screen) (Max 25 points)</p> <p>Note to Bidders: If your current system is able to provide the above, please provide a screen shot.</p>	<p><b>Exports of Data for Reports (30 points):</b>  <b>30 points:</b> Bidder's system can currently export reports (in tab delimited and/or Excel formats) to allow for data to be analyzed in more detail  <b>15 points:</b> Bidder's system can be programmed to provide this detail  <b>0 points:</b> Bidder's system cannot provide this detail</p>		<b>30</b>	
<b>Total Points Available for R5:</b>				<b>70</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R5:</b>				<b>42</b>	
<b>R6: Data Export:</b>					
<b>R6.1</b>	The Bidder can confirm that all data exports from the system will be logged and reported as part of regular reporting.	Yes	5	<b>5</b>	
		No	0		
<b>R6.2</b>	The Bidder can export into an XML format.	All Reports	5	<b>5</b>	
		No Reports	0		
<b>R6.3</b>	The Bidder has an option for vCard for one, some or all contacts.	All	5	<b>5</b>	
		Some	3		
		One	0		
<b>Total Points Available for R6:</b>				<b>15</b>	
<b>Total Points Needed to be Considered Compliant (60%) for R6:</b>				<b>9</b>	
<b>Total Points Available:</b>				<b>250</b>	
<b>Total Points Needed to be Considered Compliant (60%):</b>				<b>150</b>	





## 2. Basis of Selection

### Highest Combined Rating of Technical Merit and Price

The responsive (compliant) Bidder with the highest combined rating of technical merit **(70%)** and price **(30%)** will be recommended for award of a contract. See the following example table below.

Example of 70% Technical Merit and 30% Price Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Points Achieved by Bidder	88	82	76
Price Quoted by Bidder	\$85,000	\$80,000	\$75,000
CALCULATIONS			
	Technical Points Achieved	Rated Price Points Achieved	Total Points Achieved
Bidder 1	$\frac{88}{88} \times 70 = 70.00$	$\frac{75}{80} \times 30 = 26.47$	96.47
Bidder 2	$\frac{82}{88} \times 70 = 65.22$	$\frac{75}{80} \times 30 = 28.13$	93.35
Bidder 3	$\frac{76}{88} \times 70 = 60.45$	$\frac{75}{75} \times 30 = 30.00$	90.45
* Represents the highest technical score			
** Represents the lowest priced proposal			

**Assumption:** Three responsive (compliant) bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest bid price receive full rated percentage and other proposals are pro-rated accordingly.

The winner is the Bidder scoring the highest Total Points as a result of applying the Best Value Calculations to the technical bid and the bid price respectively. Based on the above calculations a contract would be awarded to Bidder 1.



## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

### 1. Certifications Required with the Bid

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

#### 1.1 Declaration of Convicted Offences

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgcpwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

**Note: Bidders are only required to fill out this form if they have been convicted of a criminal offence.**

### 2. Certifications Precedent to Contract Award and Additional Information

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

#### 2.1 Integrity Provisions – List of Names

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: \_\_\_\_\_

OR

Name of each member of the joint venture:

Member 1: \_\_\_\_\_

Member 2: \_\_\_\_\_



Member 3: \_\_\_\_\_

Member 4: \_\_\_\_\_

Identification of the administrators/owners:

SURNAME	NAME	TITLE

### 3. Additional Certifications Precedent to Contract Award

#### 3.1 Status and Availability of Resources

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

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

#### 3.2 Rate or Price Certification

The Bidder certifies that the price proposed is not in excess of the lowest price charged anyone else, including the Bidder's most favoured customer, for the like quality and quantity of the goods, services or both.

#### 3.3 Education and Experience

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



**3.4 Former Public Servant**

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

**DEFINITIONS:**

For the purposes of this clause, "**former public servant**" means a 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 and includes:

- (a) An individual;
- (b) An individual who has incorporated;
- (c) A partnership made up of former public servants; or
- (d) 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 Public Service.

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

**Former Public Servant (FPS) in Receipt of a Pension**

Is the Bidder a FPS in receipt of a pension as defined above? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

- (a) Name of former public servant: \_\_\_\_\_
- (b) Date of termination of employment or retirement from the Public Service. \_\_\_\_\_

**Work Force Reduction Program**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?  
**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: \_\_\_\_\_
  - Number of weeks: \_\_\_\_\_
- (g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

Contract Number:

\_\_\_\_\_  
\_\_\_\_\_

Contract Amount:

\_\_\_\_\_  
\_\_\_\_\_

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

**3.5 Aboriginal Designation**

Who is eligible?

- a) An Aboriginal business, which can be:
  - i. a band as defined by the Indian Act
  - ii. a sole proprietorship
  - iii. a limited company
  - iv. a co-operative
  - v. a partnership
  - vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

- b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

- Our Company is NOT an Aboriginal Firm, as identified above.
- Our Company is an Aboriginal Firm, as identified above. The supplier must complete the certificate in the appropriate clause below.

SACC Manual clauses [A3000T](#), [A3001T](#), [M3030T](#), [M9030T](#), [S3035T](#) and [S3036T](#) contain a certification that suppliers must complete and submit with their bid/offer/arrangement. Failure by suppliers to submit this completed certification form with their bids/offers/arrangements may render the bid/offer/arrangement non-responsive.

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date



## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **1. Security Requirements**

NRCan has determined that there is no security requirement associated with this Contract.

### **2. Insurance Requirements**

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.



## PART 7 - RESULTING CONTRACT CLAUSES

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

### 1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid dated \_\_\_\_\_. (*to be completed at contract award*)

### 2. Standard Clauses and Conditions

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

#### 2.1 General Conditions

**2035 (2016-04-04), General Conditions - Higher Complexity - Services**, apply to and form part of the Contract.

As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

#### 2.2 Supplemental General Conditions

##### 2.2.1 Dispute Resolution

###### *Mediation*

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

###### *Arbitration*

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.

###### *Meaning of "Dispute"*

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

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 or 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 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).

### 3. Security Requirements

There is no security requirement applicable to this Contract.

### 4. Term of Contract

#### 4.1 Period of the Contract

The period of the contract shall be from date of award to **March 31, 2018**, plus three (2) additional twelve (12) month options for maintenance.

### 5. Authorities

#### 5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Valerie Holmes**  
Title: Procurement Specialist  
Organization: Natural Resources Canada  
Address: 580 Booth Street, 5<sup>th</sup> Floor, Room 5-D4-2  
Ottawa, Ontario, K1A 0E4  
Telephone: (343) 292-8371  
Facsimile: (613) 947-5477  
E-mail address: [Valerie.holmes@canada.ca](mailto:Valerie.holmes@canada.ca)

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

#### 5.2 Project Authority *(to be provided at contract award)*

The Project Authority for the Contract is:

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

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.





### 5.3 Contractor's Representative

Name:  
Title:  
Tel:  
Fax:  
Email:

## 6. Proactive Disclosure of Contracts with Former Public Servants

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

## 7. Payment

### 7.1 Base de paiement – Limitation of Expenditure

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 "A", to a limitation of expenditure of \$ \_\_\_\_\_ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

1. Canada's total liability to the Contractor under the Contract must not exceed \$ \_\_\_\_\_. (*inserted at time of contract award*) Customs duties are included and Applicable Taxes are extra.
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.
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.

### 7.2 Method of Payment

#### Monthly Payments

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:



- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.

## 8. Invoicing Instructions

Invoices shall be submitted using **one of the following methods:**

<p><u>E-mail:</u></p> <p><a href="mailto:NRCAN.invoice_imaging-service_dimagerie_des_factures.RNCan@canada.ca">NRCAN.invoice_imaging-service_dimagerie_des_factures.RNCan@canada.ca</a></p> <p><b>Note:</b> Attach "PDF" file. No other formats will be accepted</p>	<b>OR</b>	<p><u>Fax:</u></p> <p>Local NCR region: <b>613-947-0987</b> Toll-free: <b>1-877-947-0987</b></p> <p><b>Note:</b> Use highest quality settings available.</p>
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Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers: Contract number: \_\_\_\_\_ (provided at time of contract award)

Invoicing Instructions to suppliers: <http://www.nrcan.gc.ca/procurement/3485>

## 9. Certifications

### 9.1 Compliance

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

## 10. Applicable Laws

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

## 11. Priority of Documents

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

- a) the Articles of Agreement;
- b) the supplemental general conditions contained herein;
- c) the general conditions **2035 (2016-04-04), Higher Complexity – Services**
- d) Annex "A", Statement of Work;
- e) Annex "B", Basis of Payment;
- f) the Contractor's bid dated \_\_\_\_\_



## **12. Foreign Nationals (Canadian Contractor OR Foreign Contractor)**

SACC Manual clause A2000C (2006-06-16) - Foreign Nationals (Canadian Contractor)

SACC Manual clause A2001C (2006-06-16) - Foreign Nationals (Foreign Contractor)

## **13. Insurance**

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.

## **14. Contract Administration**

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 [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).



## ANNEX “A” – STATEMENTS OF WORK

### SW1 Title

**Hosting, operation and maintenance of the Equipment Division Contact Data Base (EDCDB)**

### SW2 BACKGROUND

NRCan is responsible for administering the Energy Efficiency Act (EEACT 1992) and Regulations. The Act addresses the energy efficiency of energy-using products and the use of alternative energy sources. Section 5 of the Act is administered by the Equipment Division of the Office of Energy Efficiency, in the Energy Sector of NRCan.

The products prescribed by the Regulations typically must:

- a) Meet minimum energy efficiency performance standards that are outlined in the Regulations;
- b) Bear an energy efficiency verification mark based on data that is third party certified; and
- c) Bear an EnerGuide or lighting package label required (i.e. major household appliances, room air conditioners and light bulbs).

NRCan’s compliance strategy includes the promotion of energy-efficient products. Since 2001, NRCan administers and promotes in Canada the use of the international symbol for energy efficiency, ENERGY STAR.

To bear the ENERGY STAR symbol, qualified product models must be registered and meet voluntary premium energy efficiency performance levels. Users and promoters of the symbol must sign on as participants and agree to the conditions of use.

#### 1.1 *Equipment Division Contact Database*

As part of the administration of the Act, the Equipment Division communicates with interested parties about existing regulatory requirements and upcoming changes to the regulations, regulations that have come into effect, and changes in policy and procedures. A significant part of this communication is done through email, and the names and email addresses of interested parties have been held in an Equipment Division Contact Database (EDCDB).

The Equipment Division Contact Database has the following major components:

- a) **Contacts/Organizations:** The basic information about individuals or organizations that have requested that they be informed by NRCan on topics of their interest with respect to the EEAct and ENERGY STAR.
- b) **Participants Agreements:** NRCan has entered into agreements with selected parties for the purposes of promoting ENERGY STAR in Canada.
- c) **Lookups:** To facilitate the production of meaningful reports based on geography, interest areas and other topics, some fields have been identified as requiring the use of lookup fields.
- d) **Email Campaigns:** NRCan requires the ability to track each email campaign, recording the contents of the email parties that were contacted and the results of the campaign.

### SW3 OBJECTIVE

NRCan requires the ability to have effective, timely and accurate email communications with contacts who have signed participant agreements, as well as with contacts who have expressed an interest in receiving information about the programs carried out by the Equipment Division.



NRCan is looking for a supplier who would effectively take over the hosting operation and maintenance of the Equipment Division Contact Database (EDCDB). Maintenance would include the following types of activities such as user support, training for ED staff on updates, trouble shooting, looking after the overall functionality of the database, assistance in keeping contacts data current (bounce backs), and managing the systems connecting with the database (Click Dimension and external website interface) and their licenses.

NRCan owns the license for the systems and will transfer the responsibility to manage them.

## **SW4 TECHNICAL ENVIRONMENT**

### **SW4.1 Current System**

NRCan currently uses CRM Dynamics, Click Dimension and a Web URL through Amazon.

A secure Intranet website which allows authorized NRCan employees to administer the data on the site, and to access predetermined reports and exports, as required. The current system, which is hosted on an external server, has approximately 13,000 organizations and 20,000 contacts. NRCan's users access the database on their personal computer.

A secure registration website (URL through Amazon) is linked to NRCan's database and is available to the general public. It allows contacts to register and maintain their own profile including their products and program interests.

### **SW4.2 Requested Services**

The mailing process should be made easy to all users in its full capacity. NRCan staff send emails (with anchor links and attachments) to selected interest areas of the contacts or to groups that are predefined.

The system must be available in a secure way using the browsers currently installed on NRCan's workstations.

## **SW5 SCOPE OF WORK**

### **SW5.1 Description of On-Going Services**

#### **A) Self Service Web Public Website**

The Supplier will maintain a secure Internet website which allows members of the public to sign up for email communications with NRCan, including the ability to select their special areas of interest.

The Supplier will be responsible for hosting, maintenance (including minor adjustments) and back-up of the system.

#### **B) Intranet Website**

The Supplier will support the secure Intranet website which allows authorized NRCan employees to administer the data on the site, and access predetermined reports and exports, as required.

The Supplier will be responsible for hosting, maintenance and back-up of the system.

#### **C) Orientation and Documentation**

The Supplier will provide orientation on an as needed basis on the system and its use, as well as supporting on-line and hard copy documentation for its use.



**D) Maintenance of Access Control Lists**

The supplier will ensure that the Access Control Lists (ACL) are up-to-date and privileges properly allocated to the users on the system.

**E) Email List Usage**

The supplier will ensure the mailing process is made easy to all users in its full capacity.

**F) Email List Maintenance for Organizations or Contacts**

The Supplier will be responsible for updates to the content of the database on requests by NRCAN.

**G) Notifications of Special Conditions**

The Supplier will create work lists on the Intranet site that alert NRCAN to conditions that require action. These work lists will be discussed on an as needed basis.

**H) Email List Verification**

In an effort to keep the content of the database current, the supplier will initiate an annual verification of the contents of the contact database with each contact in the system.

**I) Areas of Lookup List Maintenance**

In order to allow for the selection of data sets for campaigns to be more consistent, the supplier will create certain fields from drop down lists (radio button or similar interface elements). These lists will be maintained in the database, and accessible by NRCAN for creation or updates.

**J) Business Intelligence**

The demographic information contained in both the Contacts and Participant Agreement section of the database will allow for business intelligence reports to help NRCAN understand the impact that the programs are having. The supplier will maintain business intelligence reports in the form of dashboards.

**K) Data Export**

The supplier will ensure that NRCAN has the ability to export the full data set, as well as subsets of data for additional analysis or processing.

**L) Licensing**

The supplier will be responsible for the payments required for the ongoing operation of the system solution, including but not limited to payment for the software licences, emailing traffic, hosting services and web access (excluding NRCAN and external user web access communications). This specifically includes MicroSoft CRM services for the production and (as necessary) test environments, ClickDimensions licensing, web hosting for the Registration Portal, and backup services. While NRCAN is the owner of these licences, the licensing payments (on behalf of NRCAN) are the responsibility of the supplier (for the period of the contract).

**M) Email Campaign Support and Assistance**



The supplier will provide support and assistance to NRCan in developing Email templates, mailing lists, and linked campaigns on an as needed basis, including as necessary the execution of campaigns.

**N) Extension of System Utilization**

The supplier will advise and support NRCan in making further use of the supported products (CRM Dynamics and ClickDimension) by utilization of additional features of the software products.

**SW5.2 Description of Special Services**

NRCan will require special services for the system which have not been included in the initial setup on On-going operations portions of the SOW. These would include:

- a) NRCan may require special reports which would entail a custom report to be generated;
- b) NRCan may require exports of subsets of the data;
- c) NRCan may require the import of lists of contacts, and this may include duplicate resolution/identification;
- d) On an irregular basis, NRCan may require the replacement of NRCan main contact for a group of contacts.

**SW6 RESPONSE TIME**

For the purpose of this SOW, normal business hours are defined as between 8:00 and 18:00 EDT (EST when time changes), Monday through Friday.

Under special circumstances, the lead-time might be increased where it is judged that the complexity and period of the year would make it impossible (i.e. Christmas period).

**SW7 Bidder's Response**

The general description of the work to be performed (Bidder's response) must not exceed fifteen (15) pages, CVs and realized projects description excluded. If the work description exceeds the maximum number of pages, NRCan reserves the right to review only the first fifteen (15) pages during the evaluation stage.

**SW8 REPORTING AND COMMUNICATION**

**SW8.1 Campaign Activity Reports**

- a) Email campaign summary for each campaign created and emailed to requester and administrator or be made available online for iterative reporting (as the results for a campaign will change over time as additional responses are received – one day vs a week vs a month of responses).
- b) Available on request after the campaign

**SW8.2 Monthly Activity Reports**

- a) Number of emails campaigns run, with results
- b) Total contacts, number added, updated, deleted
- c) Total organizations, number added, updated, deleted
- d) Total participant agreements, number added, updated, deleted
- e) Lookups, added and updated
- f) Exports run
- g) The status of exception work lists for bounced emails and unsubscribed addresses that require attention.



**SW8.3 Annual Activity Reports**

- a) Number of campaigns run, with results
- b) Total Contacts, number added, updated, deleted
- c) Total organizations, number added, updated, deleted
- d) Total participant agreements, number added, updated, deleted
- e) Lookups, added and updated

**SW9 DESCRIPTION OF RISKS AND CHALLENGES**

**SW9.1 Overall Challenges**

Overall goals and challenges for the future of the Equipment Database include, but are not limited to:

- a) Privacy
- b) Maintenance
- c) Verification
- d) Flexibility

**SW10 LOCATION OF WORK**

All work will be conducted strictly off site, except, if necessary, for any required on-site user training or in-person requirements gathering.





## ANNEX “B” – BASIS OF PAYMENT

### 1. LIMITATION OF EXPENDITURE

The Bidders are to provide their cost breakdown as follows:

#### 1.1 Professional Fees

Requirement	Rates	Cost
Implementation Cost Includes import/export of data	\$	\$
Maintenance for 12 months	\$	\$
<b>Total Cost for Initial Period:</b>		<b>\$</b>

#### 1.2 Option Periods

##### Option #1: April 1, 2018 to March 31, 2019

Requirement	Number of Months	Monthly Cost	Total Cost for Option #1
Maintenance and Support of the System	12 months	\$	\$

##### Option #2: April 1, 2019 to March 31, 2020

Requirement	Number of Months	Monthly Cost	Total Cost for Option #2
Maintenance and Support of the System	12 months	\$	\$

##### Option #3: April 1, 2020 to March 31, 2021

Requirement	Number of Months	Monthly Cost	Total Cost for Option #3
Maintenance and Support of the System	12 months	\$	\$