



RETURN BIDS TO:

RETOURNER LES SOUMISSIONS À:

**Bid Receiving Public Works and Government
Services Canada/Réception des soumissions
Travaux publics et Services gouvernementaux
Canada**

800 Burrard Street, Room 219

800, rue Burrard, pièce 219

Vancouver, BC V6Z 0B9

Bid Fax: (604) 775-7526

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Title - Sujet EAS Advisory Services	
Solicitation No. - N° de l'invitation EZ013-172953/A	Date 2017-12-06
Client Reference No. - N° de référence du client EZ013-172953	
GETS Reference No. - N° de référence de SEAG PW-\$VAN-531-8247	
File No. - N° de dossier VAN-7-40305 (531)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-01-18	Time Zone Fuseau horaire Pacific Standard Time PST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Mak, Goretti M.	Buyer Id - Id de l'acheteur van531
Telephone No. - N° de téléphone (604) 363-0582 ()	FAX No. - N° de FAX (604) 775-7526
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA Engineering Asset Strategy 219-800 BURRARD ST. VANCOUVER British Columbia V6Z0B9 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

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

Issuing Office - Bureau de distribution

Public Works and Government Services Canada - Pacific
Region

219 - 800 Burrard Street

800, rue Burrard, pièce 219

Vancouver, BC V6Z 0B9

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

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There are two (2) separate solicitation documents on BuyandSell.gc.ca for this requirement: solicitation EZ013-172953/A, aimed at the Advisory Services and solicitation EZ013-172953/B under the Procurement Strategy for Aboriginal Business set-aside program. Bidders that are eligible under the Aboriginal set-aside may also choose as well to make an offer for the open requirement. In this case, they must submit separate offer packages for each solicitation.

PART 1 - GENERAL INFORMATION

1.1 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 the Statement of Work, the Basis of Payment, the Task Authorization Form 572, Point Rated Evaluation Criteria and Basis of Selection, and the Federal Contractors Program for Employment Equity – Certification, and Non-disclosure Agreement.

1.2 Summary

1.2.1 Department of Public Works and Government Services Canada, Real Property Branch (RPB), Engineering Assets Strategy (EAS) (hereinafter "PWGSC-RPB-EAS"), Vancouver BC anticipates requirements for engineering assets' studies and analyses across Canada.

The specific work required will be detailed in each task authorization.

Canada intends to issue up to four (4) Contracts with Task Authorizations (CTAs) including one (1) set-aside for a total of up to \$2,000,000.00. The period of the CTAs will be two years from Contract award, with two (2) subsequent two-year option periods under the same conditions, valued at up to \$3,000,000.00 for each period, if additional funding is required.

1.2.2 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 Canadian Free Trade Agreement (CFTA), the Canada-Chile Free Trade Agreement, and the Canada-

Panama Free Trade Agreement and Canada-European Union Comprehensive Economic and Trade Agreement (CETA).

1.2.3 This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation to the Identified Users across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador must be treated as a separate procurements, outside the resulting contract.

1.2.4 The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and the annex titled [Federal Contractors Program for Employment Equity - Certification](#).

1.3 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

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (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](#) (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 180 days

2.2 Submission of Bids

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

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant – Competitive Bid

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

Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;
 - b. date of termination of employment or retirement from the Public Service.
- By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than fourteen (14) 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.

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

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 15 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions

2.7 Basis for Canada's Ownership of Intellectual Property

Public Works and Government Services Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

The material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid (4 hard copies)

Section II: Financial Bid (2 hard copies)

Section III: Certifications (1 hard copy)

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

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Bidders should:

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

Section I: Technical Bid

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

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

In this RFP, the Technical Bid is divided into two parts: Part A, the Management Bid and Part B, the Proposed Resources.

Part A: Management Bid

In its Management Bid, it is requested that the Bidder provide general information about its capacity to meet certain requirements of the bid solicitation. The Bidder is also requested to describe its capability and experience, its project management team and provide reference projects client contact(s), as detailed in Annex F. It is requested that the Bidder use **Response Forms 1, 2, 4 and 5** to provide base information about the Bidder and information that will be evaluated to assess the capacity of the Bidder to meet the requirements of this solicitation.

(1) Response Form 1 – Bid Submission Form:

Bidders are requested to include the Bid Submission form with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's list of their current Board of Directors and the province in Canada for the Applicable Laws. Using the form to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to rectify it.

(2) Response Form 2 – Resource Summary

It is requested that bidders use the Response Form 2 - *Resource Summary* to list its proposed resources by Resource Category (as found in Annex "A" Statement of Work, *A8 Resource Categories*). It is up to the Bidder to determine the exact number of resources for each Resource Category, but this must be from four to six individuals. The intent is that the Bidder propose a Suitable Team made up of resources having the Required Skill Sets and capable achieving any of the Anticipated Task Activities, as described in Annex A, Statement of Work. Education and experience will be confirmed using the individual's Resource Profile and other supporting information.

(3) Response Form 3 – Required Skill Sets

It is requested the bidders use Response Form 3 to supply the requested information for each skill set, as described in Annex A, Statement of Work for projects where its engagement has been completed within the ten years previous to the closing of the RFP.

(4) Response Form 5 – Management Bid Projects Template

It is requested that bidders use the Response Form 5 to provide details about the three projects that should be provided in support of the requirements of Annex F Article F4.1.1.3 Corporate Experience.

Part B: Proposed Resources

In this second part of the Technical Bid, the Bidder is requested to complete a Resource Profile for each of its proposed resources using the **Response Form 4 – Resource Profile**. This form permits the Bidder to provide both substantiation for the mandatory Education and Work History information provided for each of its proposed resources in the Resource Summary and also provides the template for description of the resources' point rated Demonstrated Experience.

Section II: Financial Bid

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

3.1.2 Electronic Payment of Invoices – Bid

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "H", Electronic Payment Instruments, to identify which ones are accepted.

If Annex "H", Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.1.3 Exchange Rate Fluctuation

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Annex F.

4.1.2 Financial Evaluation

4.1.2.1 Mandatory Financial Criteria

Financial evaluation criteria are included in Annex F.

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price - Bid

4.2 Basis of Selection

Basis of Selection is included in Annex F.

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.

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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.

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

In accordance with the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.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.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed) website (http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

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

5.2.3.2 Education and Experience

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

There is no security requirement applicable to the Contract.

6.2 Financial Capability

SACC Manual clause [A9033T](#) (2012-07-16) Financial Capability

Solicitation No. - N° de l'invitation
EZ013-172953/A
Client Ref. No. - N° de réf. du client
EZ013-172953

Amd. No. - N° de la modif.
File No. - N° du dossier
VAN-7-40305

Buyer ID - Id de l'acheteur
VAN531
CCC No./N° CCC - FMS No./N° VME

6.3 Insurance Requirements

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Annex C.

If the information is not provided in the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

PART 7 - RESULTING CONTRACT CLAUSES

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

The Contract is not to be used for deliveries within Comprehensive Land Claims Settlement Area (CLCSA). All requirements for delivery within a CLCA area to be processed individually.

7.1 Statement of Work

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

7.1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

7.1.2.1 Task Allocation Process

As more than one contract is expected to be awarded for this requirement, Canada will use the following approach to select/assign an appropriate contractor.

Unless a best fit exception is approved by the Contracting Authority, a Contractor will be selected based on which Contractor is farthest away from their predetermined maximum percentage distribution, therefore ensuring that work is evenly distributed as identified to the Contractors in the contract. In the case where insufficient funds remain in a Contractor's contract to complete a proposed TA, the Contractor next farthest away from their % distribution, and with enough funds remaining, will be selected for the work.

Example:

Contractor 1 has a Contract with an identified proportion of \$800,000;
Contractor 1 has been issued TAs totalling \$200,000;
Contractor 2 has a Contract with an identified proportion of \$700,000;
Contractor 2 has been issued TAs totalling \$150,000,
Contractor 3 has a Contract with an identified proportion of \$500,000;
Contractor 3 has been issued TAs totalling \$100,000

Contractor 1: $\$200,000/\$800,000 = 0.250$
Contractor 2: $\$150,000/\$700,000 = 0.214$
Contractor 3: $\$100,000/\$500,000 = 0.200$

In this case, Contractor 3's TA is only 20% expended, and Contractor 3 will be recommended for the next TA award.

The amounts of all TAs issued will be tracked by both the Project Authority and by the Contracting Authority.

The best fit exception is described as follows:

A Contractor may be considered based on their history in conducting previous phases of a client's project/program. The rationale for this best fit exception would be based on the Contractor's significant previous experience with the asset or particular type of analysis.

7.1.2.2 Task Authorization Process

1. The Project Authority (PA) or Authorized Client will provide the Contractor with a description of the task using the "Task Authorization Form" form specified in Annex D.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority or Authorized Client, within 5 business days of its receipt, the proposed total estimated cost for performing the task, work to be performed and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a Task Authorization (TA) authorized by the Project Authority or Authorized Client has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

7.1.2.3 Task Authorization Limit

The Project Authority may authorize individual task authorizations up to a limit of \$200,000.00, Applicable Taxes included, inclusive of any revisions. Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

7.1.2.4 Task Authorization - Order of Ranking

(Number inserted at Contract award; for examples see Annex F) contracts were awarded as a result of Public Works and Government Services Canada bid solicitation number EZ013-172953. The contractors' order of ranking order of ranking is as follows:

Ranked first:	Contractor _____	Est. \$ _____	<i>(to be completed at Contract award)</i>
Ranked second:	Contractor _____	Est. \$ _____	<i>(to be completed at Contract award)</i>
Ranked third:	Contractor _____	Est. \$ _____	<i>(to be completed at Contract award)</i>
Ranked fourth:	Contractor _____	Est. \$ _____	<i>(to be completed at Contract award)</i>

Dollar values include GST/HST.

7.1.2.5 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause, "Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and "Minimum Contract Value" means **10%**
2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

7.1.2.6 Periodic Usage Reports - Contracts with Task Authorizations

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "NIL" report.

The data must be submitted on a quarterly basis to the Contracting Authority.

The quarterly periods are defined as follows:

- 1st quarter: April 1 to June 30;
- 2nd quarter: July 1 to September 30;
- 3rd quarter: October 1 to December 31; and
- 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than fifteen (15) calendar days after the end of the reporting period.

Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

For each authorized task:

1. the authorized task number or task revision number(s);
2. a title or a brief description of each authorized task;
3. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
4. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
5. the start and completion date for each authorized task; and
6. the active status of each authorized task, as applicable.

For all authorized tasks:

1. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
2. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

7.2 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.

7.2.1 General Conditions

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

7.2.2 Supplemental General Conditions

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

7.2.3 Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex E, and provide it to the Project Authority before they are given access to information by or on behalf of Canada in connection with the Work.

7.3 Security Requirements

There is no security requirement applicable to the Contract.

7.4 Term of Contract

7.4.1 Period of the Contract

The Contracting Authority or Authorized Client may issue Task Authorizations between _____ up to midnight _____. Contractual obligations and deliverable completion dates under Task Authorizations may extend beyond _____ and will end once the final Task has been fully completed and all outstanding obligations performed, such as payments (including interests), warranty obligations as well as audit rights.

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two additional two-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment. Additional funding may be added to the Contract as well: up to \$3,000,000.00 per two-year option period, if required.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option to extend the Contract in either the term or funding may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a Contract Amendment.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Goretti Mak, Supply Specialist
Vancouver Acquisitions / Procurement Branch / Pacific Region
Public Works and Government Services Canada
800 Burrard Street
Vancouver, BC V6Z 0B9

Telephone: 604-363-0583
E-mail address: Goretti.Mak@pwgsc.gc.ca

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

7.5.2 Project Authority

The Project Authority for the Contract is:

To be inserted at Contract award

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.

7.5.2.1 Authorized Client

The Authorized Client for the Contract is the designated representative(s) of Infrastructure Assets Management, Strategic, Portfolio and Business Management.

A list of Authorized Clients can be requested from the Contracting Authority named in article 7.5.1.

The Project Authority or Authorized Client may authorize individual Task Authorizations up to the limit specified in article 7.1.2.2.

7.5.3 Contractor's Representative

Fill in as applicable

Name	
Title	
Organization	
Address	
Telephone	
Facsimile	
E-mail address	

7.6 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.

7.7 Payment

7.7.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment in Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

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

7.7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ _____ (**Amount to be inserted at Contract Award**). Customs duties are included and Applicable Taxes are extra.

2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.3 Monthly Payment

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:

1. 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;
2. all such documents have been verified by Canada;
3. the Work performed has been accepted by Canada.

7.7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

1. Visa Acquisition Card;
2. MasterCard Acquisition Card;
3. Direct Deposit (Domestic and International);
4. Electronic Data Interchange (EDI);
5. Wire Transfer (International Only);
6. Large Value Transfer System (LVTS) (Over \$25M)

7.7.5 Discretionary Audit - Commercial Goods and/or Services

C0100C (2010-01-11) Discretionary Audit - Commercial Goods and/or Services applies to and forms part of the Contract.

7.7.6 Time Verification

C0711C (2008-05-12) Time Verification apply to and form part of the Contract.

7.8 Invoicing Instructions

7.8.1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is Completed.

Each invoice must be supported by:

1. a copy of time sheets to support the time claimed if requested by the Project Authority;
2. a copy of the release document and any other documents as specified in the Contract;
3. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses, and other disbursements;

4. a copy of the monthly progress report.
5. invoice date (corrected for amendments);
6. invoice number;
7. period invoice covers;
8. Contract number (***number to be inserted at Contract Award***);
9. task number;
10. project number;
11. total task amount (corrected for amendments);
12. amount previously invoiced;
13. current invoice amount;
14. amount remaining on task;
15. itemized list of fees, identifying category, resource, rate, hours, and extension. Categories, rates, resources and disbursements must be pre-approved by the Authorized Client. Canada reserves the right to not pay for categories, rates, resources or disbursements submitted on invoices that have not been pre-approved. ;
16. itemized list of travel expenses, identifying resource, dates of travel, location of travel, rates;
17. itemized list of disbursements, cross-referenced to included back-up receipts.
18. the final invoice must be indicated as such.

7.8.2 Invoices must be distributed electronically as follows:

1. The Original copy must be forwarded to the addressee shown on page 1 of the Task Authorization for certification and payment.
2. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.9 Certifications

7.9.1 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.

7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

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

7.10 Applicable Laws

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

7.11 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.

- 7.11.1 the Articles of Agreement;

- 7.11.2 the supplemental general conditions 4007 (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information;
- 7.11.3 the general conditions 2035 (2017-04-27), General Conditions - Higher Complexity - Services
- 7.11.4 Annex A, Statement of Work;
- 7.11.5 Annex B, Basis of Payment;
- 7.11.6 Annex C, Insurance Requirements;
- 7.11.7 Annex D, Task Authorization form PWGSC-TPSGC 572;
- 7.11.8 Annex E, Non-disclosure Agreement;
- 7.11.9 Annex F, Bid Preparation, Point Rated Evaluation Criteria and the Basis of Selection;
- 7.11.10 Annex G, Federal Contractors Program for Employment Equity Certification;
- 7.11.11 Annex H, Electronic Payment Instruments;
- 7.11.12 the Contractor's bid dated (the Contractor's bid dated _____, (insert date of bid) (If the bid was clarified or amended, insert at the time of contract award:", as clarified on _____" or ",as amended on _____" and insert date(s) of clarification(s) or amendment(s)).

7.12 Foreign Nationals

- 7.12.1 *SACC Manual* clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor) OR
- 7.12.2 *SACC Manual* clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

7.13 Insurance Requirements

The Contractor must comply with the insurance requirements specified in Annex C. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

7.14 SACC Manual Clauses

SACC Manual clause [A9068C](#) (2010-01-11) Government Site Regulations

Annex A

Statement of Work

for

Studies and Economic Analysis Regarding Infrastructure Assets Management Engineering Assets Strategy

A1 Background

Public Works and Government Services Canada, Real Property Branch, Infrastructure Assets Management, Engineering Assets Strategy (hereinafter PWGSC-RPB-IAM-EAS) is the custodian of a portfolio of 17 major engineering assets across Canada. The major engineering assets include seven bridges, four dam complexes, and six specialized assets (such as the 835 km federal section of the Alaska Highway). In the mid-1980s, the Nielsen Task Force on Program Review directed departments to divest of land, marine and transportation assets no longer required for program purposes. This policy direction remains in place and applies to PWGSC-RPB-IAM-EAS's engineering assets.

A2 Asset Management Objectives and Approach

The strategy is to manage engineering assets as a portfolio for stewardship and divestiture. PWGSC - RPB-IAM-EAS will be undertaking in-depth studies, inspections and economic analyses to position the federal government to make prudent decisions and recommendations for the future of these assets. PWGSC -RPB-IAM-EAS will be exploring all options including: divestiture to other levels of government; transfer to other federal entities; P3 solutions; revenue opportunities and other considerations.

A3 Requirements

The Contractor must undertake financial analyses and provide consulting services in the area of major engineering assets and asset management including:

A3.1 Advising on engineering asset investment alternatives and alternate means of operating the asset.

A3.2 Advising PWGSC -RPB-IAM-EAS on divestiture, disposal, and ongoing asset and portfolio management activities related to major engineering assets.

A3.3 The Work will generally be undertaken with respect to a specific asset or portfolio as identified below. The Work may involve the collection, manipulation and analysis of large amounts of statistical data. The Work will require a strong financial, engineering and socioeconomic orientation.

A4 Deliverables - Portfolio and Asset Studies

Both specific assets, as well as portfolio studies, may be undertaken in areas such as the following:

- A4.1 Engineering asset management plans
- A4.2 Divestiture analysis and options
- A4.3 Economic and risk analysis
- A4.4 Financial analysis
- A4.5 Strategic planning
- A4.6 Stakeholder analyses
- A4.7 Traffic usage studies
- A4.8 Investment Analysis Reports for engineering construction work
- A4.9 Program and/ or portfolio planning
- A4.10 Communications

A5 Required Skill Sets

The required skill sets include the following:

- A5.1 Divestiture analysis
- A5.2 Engineering
- A5.3 Socioeconomic analysis
- A5.4 Risk and cost benefit analysis
- A5.5 Life cycle cost analysis
- A5.6 Portfolio management
- A5.7 Financial analysis
- A5.8 Business case development
- A5.9 Planning/development
- A5.10 Investment analysis
- A5.11 Community and stakeholder analysis
- A5.12 Communications

A6 Anticipated Task Activities (by resource category)

A6.1 Engineer

A6.1.1 Provision of engineering advice and recommendations in respect of capital projects including options, implications, condition impacts, risk mitigation, construction impacts, analysis of construction alternatives, construction methodologies, costs, and other relevant considerations.

A6.1.2 Input and advice on issues such as asset and portfolio management in terms of risk mitigation, divestiture strategies, asset management methodologies, and capital project prioritization.

A6.1.3 Development of asset performance indicators such as condition indicators, utilization, functionality, user ratings, stakeholder feedback, contract performance (on time, on scope, on budget), safety, service provision, and other relevant indicators.

A6.1.4 Development of 'Engineering Asset Management Plans' including components such as capital and operational plans, financial projections, utilization, stakeholder issues, economic impacts, condition assessments, risk assessment and mitigation, options analysis, value for money considerations, and other factors.

A6.2 Analyst/Economist

A6.2.1 Analysis of engineering and rehabilitation options considering issues such as cost, benefits, impacts, life cycle costs, condition, stakeholder implications, risk impacts, future financial requirements, and other relevant factors.

A6.2.2 Development of negotiation strategies in respect of divestiture or transfer to other entities.

A6.2.3 Development of business cases for specific asset improvements and/or rehabilitation in consideration of factors such as cost, risk, impact on condition, advantages/disadvantages, stakeholder impacts, alternative options, value for money, and other factors.

A6.2.4 Assessment of community and regional quantitative and qualitative benefits related to the assets.

A6.2.5 Analysis and assessment of First Nations interests and issues as they relate to management and operation of the assets and in consideration of divestiture and/or transfer alternatives.

A6.2.6 Preparing business cases in support of capital project funding requests to address required elements such as options analysis, costs/benefits, life cycle cost considerations, risk mitigation, stakeholder impacts, communications considerations, and other relevant factors.

A6.2.7 Development of documentation required for the Department's National Project Management System which would include elements common to those of business case development in addition to implementation considerations.

A6.2.8 Developing statistics on traffic usage including volumes, characteristics, forecasts, loads, etc.

A6.2.9 Risk analysis and assessment including identification, impacts, options, financial implications, risk mitigation strategies, related cost/benefits and/or impacts and other factors.

A6.3 Accountant

A6.3.1 Strategic and financial analysis of divestiture options considering issues such as strategies, negotiation positions, negotiating guidelines, impacts, costs/benefits, stakeholder implications, risk mitigation, and other relevant factors.

A6.3.2 Economic analysis of specific assets including impacts on local and regional economies, direct/indirect/induced job impacts, impacts of rehabilitation options, service levels, and other factors.

A6.3.3 Undertaking financial analyses based on discounted cash-flow models to aid in options analysis, life cycle cost analysis, value for money considerations, cost/benefit analysis, and for other decision-making tools

A6.3.4 Analysis of life cycle costs and development options with related costs/benefits, risks and mitigation strategies.

A6.3.5 Analyzing costs, revenues, schedules, resources, risks, code compliance requirements, etc., associated with project alternatives and identifying preferred engineering assets stewardship solutions.

A6.3.6 Provision of support services for negotiation of asset divestitures and/or transfers to other entities (private or public). This could include: negotiation positions, impact analysis, stakeholder analysis, communications considerations, economic impacts, and other relevant factors.

A6.4 Communications Officer

A6.4.1 Bench marking policies for infrastructure asset management by comparison to the performance and operating standards of other jurisdictions managing similar engineering assets.

A6.4.2 Bench marking the performance of assets and/or the portfolio against comparable indicators from jurisdictions with similar engineering assets. Indicators could include cost, performance, results, contract performance, risk mitigation, user feedback, service provision, and other indicators.

A7 Engineering Asset Inventory

	Asset	Location
1	Alexandra Bridge	Ottawa/Gatineau
2	Chaudière Crossing	Ottawa/Gatineau
3	MacDonald-Cartier Bridge	Ottawa/Gatineau

4	Des Joachims Bridge	Northern Ontario
5	Des Allumettes Bridge	Pembroke, Ont.
6	Rideau Falls Dams	Ottawa, Ont.
7	Timiskaming Dam Complex	Northern Ont.
8	Latchford Dam	Northern Ont.
9	Wharf at Parc Portuaire de Trois-Rivières	Trois-Rivières, PQ
10	Burlington Lift Bridge	Burlington, Ont.
11	LaSalle Causeway	Kingston Ont.
12	French River Dam Complex	Northern Ont.
13	J.C. Van Horne Bridge	Campbellton, NB
14	St. Andrews Lock and Dam	Winnipeg, Man.
15	Esquimalt Graving Dock	Victoria, BC
16	Alaska Highway	Northern BC
17	New Westminster Railway Bridge	New Westminster, BC

A8 Resource Categories

For each Task Authorization (TA), the Contractor must draw from the proposed individuals to provide a suitable resources with the appropriate knowledge, skills, expertise and experience to complete the TA.

The four categories of required resources are as follows:

Resource	Criteria / Duties
Engineer	<p>Experience: Experience refers to the number of years the individual has worked in the discipline relevant to the Specialization, and does not include time at school or time working in a different discipline. To be considered for a Specialization, the individual must have the minimum years of experience. Contractors should demonstrate/describe their relevant experience and knowledge in all of the requirement areas.</p> <p>Senior Engineer minimum 8 years' experience within their field in past 12 years; Junior Engineer minimum 3 years' experience within their field in past 5 years</p> <p>Education: Education: Must have a minimum a university undergraduate degree in Engineering from a Canadian Council of Professional Engineers (CCPE) accredited engineering program; OR a degree be from a non-CCPE accredited engineering program, the engineering education credentials must be deemed 'substantially equivalent' by the CCPE via an application to the Engineering International - Education Assessment Program, (EI-EAP); OR an engineering education credentials will be considered compliant if the resource is deemed eligible for registration as a Professional Engineer by a recognized provincial licensing body.</p> <p>Duties: The detailed duties of a senior/junior engineer include specialized asset and site inspections to assess the structural condition of an engineered asset; compiling the data within the context of a defined challenge/opportunity; analyzing the data within that context; and developing recommendations to address challenges/opportunities. These duties are especially important in developing engineering asset</p>

	management plans for 5 year programs to capital works for asset integrity.
Analyst/Economist	<p>Experience: Contractors should demonstrate/describe their relevant experience and knowledge in all of the requirement areas.</p> <p>Senior Analyst/Economist minimum 8 years' experience within their field in past 12 years; Junior Analyst/Economist minimum 3 years' experience within their field in past 5 years</p> <p>Education: Bachelor's degree from a recognized university with specialization in accounting, finance, business administration, public administration, commerce, economics or other related fields.</p> <p>Duties: The detailed duties of a senior/junior analyst/economist include reviewing and integrating economic and business data for socio-economic; life-cycle; and divestiture studies. These duties are especially important in developing economic and financial data to support prudent risk management strategies for assets and projects.</p>
Accountant	<p>Experience: Contractors should demonstrate/describe their relevant experience and knowledge in all of the requirement areas.</p> <p>Senior Accountant minimum 8 years' experience within their field in past 12 years; Junior Accountant minimum 3 years' experience within their field in past 5 years</p> <p>Education: A recognized professional accounting designation (e.g. CPA, CA, PCA, CMA, CPA and CGA).</p> <p>Duties: The detailed duties of a senior/junior accountant include specialized financial analysis; compiling and presenting specialized financial data within the context of a defined challenge/opportunity; analyzing the data within that context; and developing recommendations to address challenges/opportunities. These duties are especially important in reviewing Investment Analysis Reports.</p>
Communications Officer	<p>Experience: Contractors should demonstrate/describe their relevant experience and knowledge in all of the requirement areas.</p> <p>Senior Communications Officer minimum 8 years' experience within their field in past 12 years; Junior Communications Officer minimum 3 years' experience within their field in past 5 years</p> <p>Education: Post-secondary school degree in public relations, journalism, communications, or another discipline relevant to communications.</p> <p>Duties: The detailed duties of a senior/junior communications officer include compiling and analyzing data on stakeholders with various interests in assets/projects; and developing strategies for effectively engaging/communicating with these stakeholders.</p>

Solicitation No. - N° de l'invitation
EZ013-172953/A
Client Ref. No. - N° de réf. du client
EZ013-172953

Amd. No. - N° de la modif.
File No. - N° du dossier
VAN-7-40305

Buyer ID - Id de l'acheteur
VAN531
CCC No./N° CCC - FMS No./N° VME

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A9 Official Languages

Contractors must provide verbal communication, written communication, reports, and presentations in either or both of the Official Languages of Canada, as and when required.

Annex B

Basis of Payment

B1 Professional Fees

The Contractor will be paid firm hourly rates as follows, for work performed in accordance with the Contract. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax (GST/HST) is extra, if applicable.

The hourly rates are fixed/firm CAD for the full period of the Contract. The hourly rates for each resource in a specific category of personnel must be the same.

Time worked which is more or less than an hour must be prorated to reflect actual time worked.

B1.1 Initial Contract Period (2-year from Contract award)

Line	Resource Category	Names of Resources Identified for this Category	Hourly Rate Year 1	Hourly Rate Year 2
B1.1	Senior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.2	Junior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.3	Senior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.4	Junior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.5	Senior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.6	Junior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.7	Senior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.8	Junior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr

Separate rates for clerical support and other indirect support must not be included in the Basis of Payment. The rates of any such personnel must be incorporated into the rates of the team members being proposed.

Hourly rates include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only GST and HST if applicable. All expenses normally incurred in providing the services (i.e. project office space [including Contractor's hardware and software], word processing, reports, photocopying, courier and telephone charges, local travel and the like) are included in the hourly rates identified above, and will not be permitted as direct charges under any resulting up Task Authorization. Time worked which is more or less than an hour must be prorated to reflect actual time worked.

B1.2 Option Period One (2 year period)

Line	Resource Category	Names of Resources Identified for this Category	Hourly Rate Year 1	Hourly Rate Year 2
B1.1	Senior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.2	Junior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.3	Senior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.4	Junior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.5	Senior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.6	Junior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.7	Senior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.8	Junior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr

B1.3 Option Period Two (2 year period)

Line	Resource Category	Names of Resources Identified for this Category	Hourly Rate Year 1	Hourly Rate Year 2
B1.1	Senior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.2	Junior Engineer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.3	Senior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.4	Junior Analyst / Economist	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.5	Senior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.6	Junior Accountant	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.7	Senior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr
B1.8	Junior Communications Officer	<i>Names and rates to be inserted at Contract Award</i>	\$____/hr	\$____/hr

B2 Travel and Living Expenses

The Contractor is expected to use the most efficient, cost effective and environmentally sustainable means to interact with the client during the execution of tasks. This might include reduction in travel, use of tele-conferencing and video-conferencing, use of electronic documents, etc.

Where out-of-town travel of the Contractor is required and authorized in a Task Authorization, for the services of the resources listed in Annex B, Section B.1, the Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without markup, in accordance with the meal and private vehicle allowances specified in Appendices B, C (except Article 1.3) and D of the National Joint Council Travel Directive, : <http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". Charges for air travel must not exceed that for economy class.

All travel must have the prior authorization of the Project Authority. These expenses will be paid upon submission of an itemized statement supported by receipt vouchers.

All payments are subject to government audit.

These limits apply also to travel and living expenses of sub-contractors.

B3 Direct Expenses

The professional fees submitted in Annex B, Section B.1, are all inclusive. In certain cases and at the sole discretion of the Project Authority or Authorized Client, where services outside of normal overhead expenses are required to complete the Work, such expenses may be allowable as direct expenses given the service(s) is/are documented in the approved task authorization contract. Direct expenses must have prior authorization of the direct cost estimate by Project Authority and will be invoiced at cost with no allowance therein for overhead or profit.

Such expenses could include, but are not limited to, workshop materials including presentation materials, conference room rental, or workshop binders.

For the approved Direct Expenses, the Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work to a ceiling price of \$_____ (the amount will be inserted at the time of Task Authorization issuance). Customs duties are excluded and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

The ceiling price is subject to downward adjustment so as not to exceed the actual costs reasonably incurred in the performance of the Work and computed in accordance with the Basis of Payment.

B4 Subcontracted Services

Subcontracted Services must have the prior authorization of the Project Authority or Authorized Client in a Task Authorization and will be invoiced at cost with no allowance therein for overhead or profit.

For subcontracted services over \$25,000 (GST/HST included), the Contractor will solicit competitive bids from no less than three (3) outside suppliers. The Contractor must provide to the Contracting Authority and the Project Authority or Authorized Client, the names of the suppliers who submitted bids, the total amount of each bid obtained, the selection criteria and results.

Subcontracted Services are for project-specific requirements that do not fall under the Resource Categories in B.1.

B5 Addition of Resources and Categories

B5.1 Addition of Resources to a Category

The Contractor may propose a new resource for specific Tasks Authorization. The Contractor must follow the procedures and requirements detailed in the General Conditions 2035 at paragraph 08.

The resource will be approved for a specific Task only. Separate approvals will be required for the resource to work on a different Task.

B5.2 Addition of a Category for a Specific Task

The Contractor may propose a new Category of work for a specific Task Authorization. The Contractor must provide the Authorized Client and Contracting Authority with:

- (a) a description of that new category of work and rationale for addition;
- (b) the name(s), qualifications and experience of the proposed resource(s);
- (c) the title, education minimums, experience minimums, and hourly rate of the proposed Category;
and
- (d) Price support (if requested).

If Canada approves the proposed Category and the proposed resource(s), the Contract Authority will issue an amendment to the Task Authorization to include the Category and resource(s), if appropriate, for the specific Task. If the Contractor wants to propose the same Category and the same or other resource(s) to work on a different Task, the Contractor must obtain the approval from the Authorized Client for that Task.

If Canada determines that the Category would improve the TA Contract, the Contracting Authority will request that all Contract holders in the series provide a resource for this new Category. The new Category will be established only if all Contractors can provide a resource meeting the established qualifications, and the Contract Authority will issue an amendment to the Contract to include the Category and resource(s).

The Hourly Rate for any miscellaneous Category/Title provided must not exceed the highest Hourly Rate offered for Labour Rates above. Canada reserves the right to accept or reject any or all responses received in this category.

Annex C

Insurance Requirements

The Contractor must comply with the insurance requirements specified below. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract. The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

C1 Commercial General Liability Insurance

C1.1 The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

C1.2 The Commercial General Liability policy must include the following:

- (a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
- (b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
- (c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
- (d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
- (e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
- (f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
- (g) Employees and, if applicable, Volunteers must be included as Additional Insured.
- (h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- (i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- (j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- (k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

Solicitation No. - N° de l'invitation
EZ013-172953/A
Client Ref. No. - N° de réf. du client
EZ013-172953

Amd. No. - N° de la modif.
File No. - N° du dossier
VAN-7-40305

Buyer ID - Id de l'acheteur
VAN531
CCC No./N° CCC - FMS No./N° VME

C2 Errors and Omissions Liability Insurance

C2.1 The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defense costs.

C2.2 If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

C2.3 The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

Annex D

Task Authorization Form PWGSC TPSGC 572



Public Works and Government
 Services Canada

Travaux publics et Services
 gouvernementaux Canada

Annex
Annexe _____

**Task Authorization
 Autorisation de tâche**

Contract Number - Numéro du contrat

Contractor's Name and Address - Nom et l'adresse de l'entrepreneur	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu
	Total Estimated Cost of Task (Applicable taxes extra) Coût total estimatif de la tâche (Taxes applicables en sus) \$
Security Requirements: This task includes security requirements Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité <input type="checkbox"/> No - Non <input type="checkbox"/> Yes - Oui If YES, refer to the Security Requirements Checklist (SRCL) included in the Contract Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat	

For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu	Total Estimated Cost of Task (Applicable taxes extra) before the revision Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision \$	Increase or Decrease (Applicable taxes extra), as applicable Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu \$
--	--	---

Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.

Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.

1. Required Work: - Travaux requis :

A. Task Description of the Work required - Description de tâche des travaux requis	See Attached - Ci-joint <input type="checkbox"/>
B. Basis of Payment - Base de paiement	See Attached - Ci-joint <input type="checkbox"/>
C. Cost of Task - Coût de la tâche	See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement	See Attached - Ci-joint <input type="checkbox"/>

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EZ013-172953

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File No. - N° du dossier
VAN-7-40305

Buyer ID - Id de l'acheteur
VAN531
CCC No./N° CCC - FMS No./N° VME

Annex
Annexe _____

Contract Number - Numéro du contrat

2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

Name and title of authorized client - Nom et titre du client autorisé à signer

Signature

Date

PWGSC Contracting Authority - Autorité contractante de TPSGC

Signature

Date

3. Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized - to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature

Date

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File No. - N° du dossier
VAN-7-40305

Buyer ID - Id de l'acheteur
VAN531
CCC No./N° CCC - FMS No./N° VME

Annex E

Non-Disclosure Agreement

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligations of this Agreement shall survive the completion of the Contract and any Tasking.

Signature

Date

Annex F

Bid Preparation, Point Rated Evaluation Criteria and the Basis of Selection

F1 Evaluation Procedures

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

As noted in Part 3, Section I: Technical Bid, in their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the Work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. Each responsive bid - that is, each bid that has met all of the mandatory requirements - will be evaluated against the point rated criteria. It is recommended that bidders address the selection criteria in sufficient detail and depth to demonstrate a clear understanding of the requirements and the services to be provided, so as to allow a complete assessment by the evaluation team. Bidders should clearly identify in their submission document the specific criteria addressed by each section, and indicate clearly if additional supporting information for one section is provided in another section of the bid, to enable the evaluators to find and score the information.

F2 Mandatory and Point Rated Requirements

F2.1 Interpretation

The words "must", "shall", "essential" and "will" are to be interpreted as mandatory requirements. This may include documents to be supplied or types of information to be provided. Statements which contain the words "should", "would", "may" and "desirable" are to be interpreted as preferred but not mandatory at bid close.

F2.2 Mandatory Compliance and Points Summary Table (maximum up to 796 points)

F3 Mandatory Criteria			
F3.1 Mandatory Technical Criteria		Yes	No
F3.1.1	Proposed Resources by Resource Categories. Minimum of 4 names and maximum of 6 names for each of the Resource Categories (only first 6 will be evaluated). Bidder is requested to confirm using Response Form 2 – Resource Summary		
F3.1.2	Bidders must indicate that their resources are available in a minimum of 3 out of 6 major business centres across Canada (Vancouver, Ottawa, Toronto, Montreal and Halifax, Winnipeg) Bidder is requested to confirm using Response Form 2 – Resource Summary		
F3.2 Mandatory Financial Criteria			
F3.2.1	Single Rate per Resource Category in Financial Bid		

F4 Point Rated Technical Criteria		Points	Sub-points	%
F4.1	Management Bid	50		
F4.1.1	Corporate Profile		10	
F4.1.2	Required Skill Sets		10	
F4.1.3	Corporate Experience		30	
F4.1.4	Service Delivery Approach and Methodology	50		
F4.1.4.1	Understanding of Requirements/Working with Government		15	
F4.1.4.2	Management Structure, QC and Risk Management Approach		20	
F4.1.4.3	Delivery Management Approach		15	
F4.2	Education, Accreditation and Demonstration of Proposed Resources (Based on the provision of six resources per category)	696		
F4.2.3.1	Senior and Junior Engineer [6x (2+15)] + [6x (2+10)]		174	
F4.2.3.2	Senior and Junior Analyst/Economist [6x (2+15)] + [6x (2+10)]		174	
F4.2.3.3	Senior and Junior Accountant [6x (2+15)] + [6x (2+10)]		174	
F4.2.3.4	Senior and Junior Communications Officer [6x (2+15)] + [6x (2+10)]		174	
	Maximum Points	796		
	Minimum Points (Based on minimum provision of four resources per category (464) + 50 + 50 = 564 X 70%)			395

F3 MANDATORY CRITERIA

F3.1 Mandatory Technical Criteria

The Bidder must meet all of the following mandatory criteria in order to be considered. Failure to do so will result in the bid being non-responsive and not considered for further evaluation and subsequent contract award.

The Bidder must provide the following information in their bid:

F3.1.1 Proposed Resources by Resource Categories

The Bidder must identify a minimum of four (4) and a maximum of six (6) resources for each of the Resource Categories detailed in Annex "A" Statement of Work, *A8 Resource Categories*, having the required education and experience and capable of performing the duties described. This should permit the Bidder's team to perform all of the activities identified in Annex A, Statement of Work, Article A6, Anticipated Task Activities. It is requested that the Bidder use **Response Form 2, Resource Summary** for their responses and provide a profile of each resource using the **Response Form 3, Resource Profile** to confirm details from the summary. This form will also be used to provide the details of the resource's Demonstrated Experience that will be point rated, as noted below. If more than six resources are proposed, only the first six will be evaluated.

F3.1.2 Proposed Resources by Geographic Location

Bidders must indicate in their bid (it is requested that they respond on **Response Form 2, Resource Summary**) that they have proposed resources working from three (3) out of these six (6) major business centres across Canada: Vancouver, Winnipeg, Toronto, Ottawa, Montreal and Halifax.

F3.2 Mandatory Financial Criteria

Single Rate per Resource Category in Financial Bid

A single rate must be identified in the Financial Bid (Annex B) for each Resource Category.

F4 POINT RATED TECHNICAL CRITERIA

Each bid found responsive as meeting all Mandatory Requirements will be evaluated against the criteria listed in the **Points Summary Tables**. It is recommended that the Bidder address these criteria in the following order and in sufficient detail and depth to demonstrate a clear understanding of the requirements and the services to be provided, so as to allow a complete assessment by the evaluation team. Bidders should clearly identify in their submission document the specific criteria addressed by each section.

For each rated criterion, where a maximum number of points is shown, evaluators may award any whole or partial point from zero up to the maximum number of points.

Bidders must achieve the **minimum acceptable points** for **each** criterion as detailed in the various Points Summary Tables in order to be considered responsive. Failure by the Bidder to achieve all of the Minimum Acceptable Points will render the Bidder's bid non-responsive and no further consideration will be given.

Bidders must achieve an **Overall Minimum Score of 395 points** out of the **total 796** points available in order to be considered responsive. Failure by the Bidder to achieve the Minimum Total Score will render the Bidder's bid non-responsive and no further consideration will be given.

F4.1 Management Bid

In its management bid, the Bidder should describe its capability and experience, present the project management team and provide reference projects and project references(s).

F4.1.1 Corporate Profile and Experience (up to 50 points)

Section	Criteria	Total Points
F4.1.1.1	<p>Corporate Profile: The Bidder must have the corporate capacity to provide the services required by PWGSC for the diverse types of work related to engineering assets studies and analyses.</p> <p>The Bidder is requested to provide its company profile including the legal name of the organization, the current and previous operating name(s) if different from legal name, legal structure (e.g. corporation, partnership, privately-held etc.), as well as a description of the company's history, management team, services, product lines, annual sales volume (in dollars), location(s), head office, size, years in business and track record.</p>	8
F4.1.1.2	<p>Required Skill Sets; The Bidder's team must have the required skill sets to perform the Work. The Bidder is requested to, using the grid provided as in Response Form 3 – Required Skill Sets, indicate completed projects where it has performed the required skill sets as detailed under Annex A, A5 Required Skill Sets. One point will be allocated for each confirmed skill set to a total of 10 points.</p>	12
F4.1.1.3	<p>Corporate Experience: The Bidder must have the proven ability to complete projects similar in scope and size (estimated at a value of \$200,000 or more) to those in the PWGSC-RPB-EASS infrastructure portfolio on time and within budget. This is to be separate from the individual resources' experience. This is the firm's experience.</p>	

	<p>The Bidder is requested to provide information describing its participation in each of three (3) projects of similar scope and size to those in the PWGSC-RPB-EASS infrastructure portfolio and performing activities similar to Annex A, Statement of Work, Article A6, Anticipated Task Activities, which demonstrate the relevant corporate experience of the company. The participation must have been completed within the five (5) years previous to this tender's close.</p> <p>It is requested that the Bidder provide this information on Response Form 5, Management Bid Projects Template provided at the end of this RFP and that the form be signed off by a representative of the project client substantiating the information provided. The client may also provide an additional reference note as an option.</p>	<p>3 X 10 points = 30 points</p>
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F4.1.2 Service Delivery Approach and Methodology (up to 50 points)

Section	Criteria	Total Points
F4.1.2.1	<p>Understanding of Requirements/Working with Government</p> <p>The Bidder must demonstrate a clear understanding of the goals, objectives, issues, challenges and opportunities with respect to this requirement in the current government context.</p> <p>It is requested that the Bidder:</p> <ul style="list-style-type: none"> i) identify and describe in its own words the goals, objectives and scope of the requirement as it understands them ii) Given the requirements as defined in the SOW, identify and describe the issues, challenges and opportunities related to any resulting Contract, including special challenges of working with government entities (e.g. public scrutiny, budgetary constraints, socio-economic programs, trade agreements, sustainable development, Official Languages, etc.); and, iii) Discuss the key success factors which should be considered in order to address these issues, challenges and opportunities. 	<p>5</p> <p>5</p> <p>5</p>
F4.1.2.2	<p>Management Structure, Quality Control and Risk Management Approach</p> <p>The Bidder must demonstrate a sound approach in structuring and managing project team(s), quality control and risk management for service delivery during the contract term.</p> <p>It is requested that the Bidder describe its approach to:</p> <ul style="list-style-type: none"> i) Maintaining a suitable team to deliver the requirement of any resulting contract including the retention and development of proposed resources; ii) structuring and managing project team(s) to deliver the Tasks issued for this requirement, including project team management structure, reporting relationship(s) and organization chart; iii) project management considerations including meeting deadlines; quality monitoring and control for required services and deliverables as well as invoicing; 	<p>5</p> <p>5</p> <p>5</p>

	iv) quality control and risk management as it relates to delivery of these services; the escalation process should conflicts, delays or inadequate work be encountered, including an escalation chart.	5
F4.1.2.3	<p>Delivery Management Approach</p> <p>The Bidder must demonstrate a sustainable approach in service delivery management and a clear methodology in managing multiple concurrent requirements / projects.</p> <p>It is requested that the Bidder describe its service delivery management approach to demonstrate:</p> <ul style="list-style-type: none"> i) its adaptability to fluctuating workload including its ability to deal with and deliver multiple concurrent requirements; ii) its commitment to environmental citizenship in the delivery of the required services. iii) its implementation process once the scope of work for a Task is established, including communications and the need for bilingual service delivery. 	<p>5</p> <p>5</p> <p>5</p>

F4.2 Education/Accreditation, Work History and Demonstrated Experience of Proposed Resources (up to 696 points)

Bidders have been requested to use **Response Form 4, Resource Profile** to provide the substantiation for the mandatory information provided in the Resource Summary for the resources that they are proposing for this requirement. Using the Resource Profile, the Bidder may also provide additional relevant education and work history information for each resource. Where warranted, evaluators may award up to one additional point for each of Education and Work History.

In addition, bidders are asked to demonstrate the resources' relevant demonstrated experience and expertise in substantiation of their suitability for the applicable Resource Category, as specified in Annex A, Statement of Work, Article A8, Resource Categories. It is requested that they provide the requested information for three (3) projects for each of the Senior resources and two (2) projects for each of the Junior resources. Each project will be evaluated according to the applicability to the requirement to a maximum of 5 points per project. If six resources are provided for each Resource Category and level, they will be evaluated and point rated; if only five or four resources are presented, the Bidder will receive only the points that these resources have achieved.

Canada reserves the right to validate any education, accreditation or work history documentation before the award of any contract, including requesting hard copy education and accreditation certifications. Client contacts for referenced projects may also be contacted and if the project work cannot be validated, the evaluation team may award part or no points for that project.

F5 Generic Evaluation Table

The following generic table will be used in the evaluation in order to provide a common vocabulary for point rated scoring. The appropriate Type of evaluation will be used for each point rated evaluation. For a 5 point scale, the score for these elements will be divided by 2.

Type of Evaluation	Non Responsive	Inadequate	Weak	Adequate	Fully Satisfactory	Strong
	0 Point	2 Points	4 Points	6 Points	8 Points	10 Points
1. Requirements	Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements.	Demonstrates a very good understanding of the requirements.	Demonstrates an excellent understanding of the requirements.
2. Weaknesses	Did not submit information which could be evaluated	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses
3. Qualifications and Experience	Did not submit information which could be evaluated	Proponent do not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced
4. Sample Projects	Did not submit information which could be evaluated	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement

F6 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable taxes excluded, Canadian customs duties and exercise taxes included.

The Bidders must submit their financial bid as outlined in Annex "B." Failure to do so will result in the bid being considered non-responsive and not evaluated further.

Hourly rates are to remain firm for the complete period of the Contract and the option period.

Rates must be quoted only for the generic resource categories described in Annex B. The currency of the quoted rates must be in Canadian dollars.

The Financial Proposal will be evaluated as per **F6.1 Weighted Financial Bid Evaluation Table**, following. These totals are for bid evaluation and contractor selection purposes only:

A weighted average rate for all Resource Categories will be determined for each of Year 1, Year2, Year 3, Year 4, Year 5 and Year 6. The estimated weight is only an estimate and is provided only for bid evaluation purposes.

F6.1 Weighted Financial Bid Evaluation Table (rates will be taken from those provided in Annex B: Basis of Payment)

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Resource Category	Weight	Year 1	Weight x Year 1 rate (B x C)	Year 2	Weight x Year 2 rate (B x E)	Year 3	Weight x Year 3 rate (B x G)	Year 4	Weight x Year 4 rate (B x I)	Year 5	Weight x Year 5 rate (B x K)	Year 6	Weight x Year 6 rate (B x M)
Senior Engineer	40%	\$ ___ /hr											
Junior Engineer		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr	
Senior Analyst / Economist	40%	\$ ___ /hr											
Junior Analyst / Economist		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr	
Senior Accountant	10%	\$ ___ /hr											
Junior Accountant		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr	
Senior Communications Officer	10%	\$ ___ /hr											
Junior Communications Officer		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr		\$ ___ /hr	
Yearly Weighted Average Rate Subtotal													
Six Year Total													

The Six Year Total will be established as Evaluated Price for the Basis of Selection.

F7 Basis of Selection

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)

F7.1 To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
- b. meet all mandatory criteria; and
- c. obtain the required minimum of 70 weighted points for the Total Technical Score for the point rated technical criteria.

F7.2 Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

F7.3 The lowest evaluated price (LP) of all responsive bids will be identified and a pricing score (PS) determined as follows, will be allocated to each responsive bid: $PS = LP / P \times 30$. Pi is the evaluated price (P) of each responsive Bid.

F7.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid: $TMS = OS / \text{Max Point} \times 70$. OS is the overall score (OS) obtained by each responsive bid for all the point rated technical criteria specified in Annex F, determined as follows: total number of points obtained / maximum number of points available.

F7.5 The combined rating (CR) of technical merit and price of each responsive bid will be determined as follows: $CR = PS + TMS$.

F7.5.1 An example listed below where all three bids are responsive and the selection of the contractor is determined by 70/30 ratio of technical merit and price, respectively.

Technical Formula: Total Merit Score = Overall Score / Max Point x 70% (TMS=OS / Max Point x 70%)

Price Formula: Pricing Score=Lowest Evaluated Price / Price x 30% (PS=LP / P x 30%)

Combined Rating= Pricing Score (PS) + Total Merit Score (TMS) (CR=PS + TMS)

Highest Combined Rating Technical Merit (70%) and Price (30%)*				
Calculation	Total Merit Score (TMS) =OS/Max Point x 70%	Price Score (PS) =LP/P x 30%	Combined Rating (CR) =TMS + PS	Rank
Bidder 1 ▪ Overall Score (OS) = 488 ▪ Price (P) = \$1,449.50	$\frac{488 \times 70\%}{796} = 42.91$	$\frac{\$1,294.50 \times 30\%}{\$1,449.50} = 26.80$	69.71	3
Bidder 2 ▪ Overall Score (OS) = 582 ▪ Price (P) = \$1,294.50	$\frac{582 \times 70\%}{796} = 51.18$	$\frac{\$1,294.50 \times 30\%}{\$1,294.50} = 30.00$	81.18	2
Bidder 3 ▪ Overall Score (OS) = 676 ▪ Price (P) = \$1,306.70	$\frac{676 \times 70\%}{796} = 59.45$	$\frac{\$1,294.50 \times 30\%}{\$1,306.70} = 29.72$	89.17	1

* Represents the lowest priced proposal

F7.6 The responsive bids will be ranked in accordance in descending order of combined rating of technical merit and price; the responsive bid with the highest combined rating of technical merit and price

being ranked first. Of the highest ranked responsive bids in descending order of combined rating of technical merit and price, up to three will be recommended to receive of technical merit and price, these bids will be ranked in ascending order of evaluated prices; the responsive bid with the lowest evaluated price being ranked the highest.

As the total estimated utilization of all contracts combined is forecasted at up to \$2,000,000.00 during the initial two year period, and \$3,000,000.00 for each of the subsequent two-year option period, the following calculation will be used to determine the resulting contract proportional value amounts:

F5.6.1 Where there are Three or More Responsive Bids

F5.6.1.A Initial Contract Period:

1) Where there are THREE Responsive Bids	
Bid with the highest total score (40%)	\$800,000.00
Bid with the second-highest total score (35%)	\$700,000.00
Bid with the third-highest total score (25%)	\$500,000.00
2) Where there are TWO Responsive Bids	
Bid with the highest total score (55%)	\$1,100,000.00
Bid with the second-highest total score (45%)	\$ 900,000.00
3) Where there are ONE Responsive Bids	
Bid with the highest total score (100%)	\$2,000,000.00

If there is at least one compliant bidder on the Aboriginal Set-Aside Solicitation, then the last-ranked bidder in the scenarios #1 above will be recommended for award of a Contract that is \$400,000 less than the amount listed. The first-ranked compliant bidder on the Aboriginal Set-Aside Solicitation will be recommended for award of a \$100,000 Contract with a 5% minimum work guarantee.

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Response Form 1 – Bid Submission Form

BID SUBMISSION FORM	
Bidder's full legal name	
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name
	Title
	Address
	Telephone #
	Fax #
	Email
Bidder's Procurement Business Number (PBN) [see the <i>Standard Instructions 2004</i>]	
Jurisdiction of Contract: Province in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)	
Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder . Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s). Bidders bidding as societies, firms, or partnerships do not need to provide lists of names.	
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> 1. The Bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 	
Signature of Authorized Representative of Bidder	Date

Response Form 2 - Resource Summary

The Bidder is requested to use this form to list its proposed resources by **Resource Categories** (in Annex "A" Statement of Work, A8 Resource Categories). Please add the appropriate number of rows for the number of individuals proposed. It is up to the Bidder to determine the exact number of resources for each category, but this must be from four to six. Education and experience will be confirmed using the individual's Resource Profile and other supporting information.

A. Senior Level

Resource Category	A Name & Working Location	B Education / Accreditation	C # Years general relevant experience
Senior Engineer		Must have a minimum a university undergraduate degree in Engineering from a Canadian Council of Professional Engineers (CCPE) accredited engineering program; OR a degree be from a non-CCPE accredited engineering program, the engineering education credentials must be deemed 'substantially equivalent' by the CCPE via an application to the Engineering International - Education Assessment Program, (EI-EAP); OR an engineering education credentials will be considered compliant if the resource is deemed eligible for registration as a Professional Engineer by a recognized provincial licensing body.	A minimum of 8 years of relevant related work experience in the last 12 years
Example	John Smith Winnipeg	BASc, PEng, MEng	15 years
1.			
2.			
3.			
4.			
5.			
6.			
Senior Analyst / Economist		Must have a Bachelor's degree from a recognized university with specialization in accounting, finance, business administration, public administration, commerce, economics or other related fields.	A minimum of 8 years of relevant related work experience in the last 12 years
1.			
2.			
3.			
4.			
5.			
6.			

Senior Accountant		A recognized professional accounting designation (e.g. CPA, CA; PCA, CMA, CPA or CGA).	A minimum of 8 years of relevant related work experience in the last 12 years
1.			
2.			
3.			
4.			
5.			
6.			
Senior Communications Officer		Post-secondary school degree in public relations, journalism, communications, or another discipline relevant to communications.	A minimum of 8 years of relevant related work experience in the last 12 years
1.			
2.			
3.			
4.			
5.			
6.			

B. Junior Level

Resource Category	A Name & Working Location	B Education / Accreditation	C # Years general relevant experience
Junior Engineer		Must have a minimum a university undergraduate degree in Engineering from a Canadian Council of Professional Engineers (CCPE) accredited engineering program; OR a degree be from a non-CCPE accredited engineering program, the engineering education credentials must be deemed 'substantially equivalent' by the CCPE via an application to the Engineering International - Education Assessment Program, (EI-EAP); OR an engineering education credentials will be considered compliant if the resource is deemed eligible for registration as a Professional Engineer by a recognized provincial licensing body.	A minimum of 2 years of relevant related work experience in the last 5 years
Example	Jean Francois Duval, Ottawa	BASc, PEng, MEng	3 years 9 months
1.			
2.			
3.			

4.			
5.			
6.			
Junior Analyst / Economist		Must have a Bachelor's degree from a recognized university with specialization in accounting, finance, business administration, public administration, commerce, economics or other related fields.	A minimum of 2 years of relevant related work experience in the last 5 years
1.			
2.			
3.			
4.			
5.			
6.			
Junior Accountant		A recognized professional accounting designation (e.g. CPA, CA; PCA, CMA, CPA or CGA).	A minimum of 2 years of relevant related work experience in the last 5 years
1.			
2.			
3.			
4.			
5.			
6.			
Junior Communications Officer		Must have a post-secondary school degree in public relations, journalism, communications, or another discipline relevant to communications	A minimum of 2 years of relevant related work experience in the last 5 years
1.			
2.			
3.			
4.			
5.			
6.			

- A. **Name:** An individual may only be listed under ONE RESOURCE CATEGORY ONLY and only at one level. The resource must meet the Resource Criteria identified in columns B and C. It is requested that the resource's Working Location (the location of the office out of which the resource works) be provided.
- B. **Education/Accreditation:** Highest level (or most relevant) of certifications, diplomas, degrees obtained. Identify professional designation and other relevant credentials, if any, and the jurisdiction to which the accreditation applies (i.e. Ontario, Quebec, BC etc.)
- C. **Years of relevant experience:** Identify the number of years (within the past X years) that the individual has worked in his/her discipline relevant to the scope of services requested in Annex A. These years must be easily identifiable in the individual's Resource Profile (created from Response Form 3, *Resource Profile* following) and any supporting materials.

Response Form 3 - Required Skill Sets

The Bidder is requested to supply the requested information for each skill for projects where its engagement has been completed within ten (10) years previous to the closing of the RFP. One point will be given for each skill set confirmed by the Bidder to a total of 10 points. The evaluation team reserves the right to request more information about the engagement in any of the projects detailed.

Skill Set	Project Name and Location	Date	Resources used who are proposed in current RFP
A5.1 Divestiture analysis			
A5.2 Engineering			
A5.3 Socioeconomic analysis			
A5.4 Risk and cost benefit analysis			
A5.5 Life cycle cost analysis			
A5.6 Portfolio management			
A5.7 Financial analysis			
A5.8 Business case development			
A5.9 Planning/ development			
A5.10 Investment analysis			
A5.11 Community and stakeholder analysis			
A5.12 Communications			

Response Form 4 - Resource Profile

The Resource Profile consists of two parts: A: Substantiation of Mandatory Items and B: Substantiation of Point Rated Items. The resource will be evaluated on the basis of this information alone; it is not required to provide the individual's personal curriculum vitae.

A: Substantiation of Mandatory Items Bidders are requested to use the following template to create a Resource Profile for each of their proposed resources in order to provide substantiation for the information provided in the Resource Summary for their proposed resources. Bidders are to ensure that this more detailed information matches up with the information provided in the Summary including the highest level of Relevant Education (although other degrees, certificates, etc may be mentioned here only) and the number of years and months of Relevant Work Experience (adding up to the numbers stated in the Resource Summary). Other relevant work experience may be provided as well. If any inconsistencies are found, the information in the Resource Profile will prevail.

A: SUBSTANTIATION OF MANDATORY ITEMS (RESOURCE SUMMARY)			
Proposed Resource Category and Level: <i>from Annex A, Statement of Work, Article A8:</i>			
Name of Resource:			
Working Location:			
Relevant Education/ Accreditations <i>Must be from a recognized post-secondary institution.</i>	Degree/Accreditations	Institution	Date Completed
Relevant Work Experience <i>By named resource category</i>	Company Name Address Contact Information	Job Title Relevant Duties and Responsibilities	Start Date: MM/YY End Date: MM/YY Duration: YYMM

B: Substantiation of Point Rated Items: Demonstrated Expertise Bidders are requested to select from the work history of their proposed resource and provide examples of projects showing the knowledge and skills gained from past experience with engineering assets and asset management projects, including in the specific activities detailed in Annex A Statement of Work, Article A6, *Anticipated Task Activities*.

Each Project used to demonstrate expertise must have begun within the 10 years previous to the closing date of this RFP and the total project must be valued at a minimum of CDN\$200,000. The engagement of the resource must have been completed before the closing of this RFP. It is requested that contact information be provided for a representative of the Client able to confirm this information.

A project profile must be completed and submitted for two (2) projects for each of the Junior level resources and three (3) projects for each of the Senior level resources.

B: SUBSTANTIATION OF POINT RATED ITEMS – INDIVIDUAL RESOURCES
Demonstrated Experience and Expertise in the Applicable Resource Category. The proposed resource should have knowledge and skills gained from past experience with recent engineering assets and asset management projects, including in the specific deliverables, skillsets, and activities detailed in Annex A

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Statement of Work, Articles A4: <i>Deliverables - Portfolio and Asset Studies</i> , A5, <i>Required Skill Sets</i> , and A6, <i>Anticipated Task Activities</i> relevant to their Resource Category	
Project #1	
Name: _____	
Start Date (Project): _____	End Date (Project) _____
Start Date (Engagement): _____	End Date (Engagement) _____
Client: _____	Approximate Value of Project: CDN\$ _____
Location: (city/province/country)	
Project Scope/Objective(s):	
Role/Duties of Resource:	
Outcome of Project:	
Client Contact Information: Name: _____ Title: _____	
Phone: _____	Email: _____
Project #2	
Project Name: _____	
Start Date (Project): _____	End Date (Project) _____
Start Date (Engagement): _____	End Date (Engagement) _____
Client: _____	Approximate Value of Project: CDN\$ _____
Location: (city/province/country)	
Project Scope/Objective(s):	
Role/Duties of Resource:	
Outcome of Project:	
Client Contact Information: Name: _____ Title: _____	

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Phone: _____ Email: _____
Project #3 (Senior Resources only)
Project Name: _____
Start Date (Project): _____ End Date (Project): _____
Start Date (Engagement): _____ End Date (Engagement): _____
Client: _____ Approximate Value of Project: CDN\$ _____
Location: (city/province/country)
Project Scope/Objective(s):
Role/Duties of Resource:
Outcome of Project:
Client Contact Information: Name: _____ Title: _____
Phone: _____ Email: _____

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Response Form 5 - Management Bid Projects Template

1. It is requested that three copies be made and this Response Form be used for each reference project.
2. If the dollar value of the project is confidential, an estimate must be given or the project will not be evaluated.
3. It is requested that the Confirmation block be signed by a representative of the Client familiar with the project and the work of the Bidder on the project. If the work of the Bidder has not been confirmed by the Client, the project may not be evaluated and no points allocated for the project.
4. The Bidder may remove these instructions and may insert additional lines where necessary but the total completed form must not be more than two pages. Only the first two pages will be read.

Project # _____ of 3 Name of the Project: _____
Client Name: _____
Brief Description of the Project (including location): _____ _____
Brief Description of the involvement of the Bidder, _____, in the Project ("the Engagement") : _____ _____
Project Start Date: _____ Project End Date: _____
Engagement Start Date: _____ Engagement End Date: _____
Engagement Deliverables On time? Y / N Notes:
Est. Project \$\$ Value*: _____ Engagement \$\$ Value*: _____
Engagement Deliverables On budget? Y / N Notes:
Scope of services provided:
Key RELEVANT deliverables (see Annex A: A4: Deliverables - Portfolio and Asset Studies):
Name and role of Bidder's assigned resources:
Contribution by Resources proposed for this RFP: (provide additional rows as required.
Name(s) and Expertise Provided (see Annex A: A5 Required Skill Sets):

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CONFIRMATION BY CLIENT
Confirmed by representative of Client: (name) _____
Phone Number: _____ Email: _____
Role in Client Company _____ Role in Project _____
Signature: _____ Date: _____
Additional information may be provided by Client representative (optional):

ANNEX G

Federal Contractors Program for Employment Equity Certification

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
 - A2. The Bidder certifies being a public sector employer.
 - A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
 - A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
 - A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
 - A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.
- OR**
- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.
- OR**
- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

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ANNEX H

Electronic Payment Instruments

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

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the outside of the envelope or package containing your bid submitted by mail or courier. Always ensure your company name, return address, open bidding solicitation number and closing date appear legibly on the outside of your bid submission.

AVIS AUX FOURNISSEURS: Pour le retour par la poste ou par messenger, veuillez utiliser UNE des étiquettes d'envoi ci-dessous et apposez-la à l'extérieur de votre enveloppe ou du colis contenant votre offre. Assurez-vous que le nom de votre compagnie, l'adresse de retour, le numéro de l'invitation ouverte à soumissionner et la date de clôture soient lisibles à l'extérieur de votre offre.

**Bid Receiving
Public Works & Government Services Canada
219 - 800 BARRARD STREET
VANCOUVER BC V6Z 0B9
Attn : Goretti Mak**

Solicitation No. : EZ013-172953/A

**Réception des soumissions
Travaux publics et services gouvernementaux Canada
800 rue Burrard, 219
Vancouver (C.-B) V6Z 0B9
Attn : Goretti Mak**

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