



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**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 Advertising Creative Services	
Solicitation No. - N° de l'invitation EP361-180010/B	Date 2018-01-16
Client Reference No. - N° de référence du client EP361-18-0010	
GETS Reference No. - N° de référence de SEAG PW-\$\$CZ-002-74145	
File No. - N° de dossier cz002.EP361-180010	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-02-21	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Ivany, Chris	Buyer Id - Id de l'acheteur cz002
Telephone No. - N° de téléphone (613) 993-0048 ()	FAX No. - N° de FAX (613) 949-1281
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: Public Services and Procurement Canada/ACPD, Attn: Steve Chapman 4TH FL., Office 037 350 ALBERT ST. OTTAWA Ontario K1A0S5 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

Communication Procurement Directorate/Direction de
l'approvisionnement en communication

360 Albert St. / 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

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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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;
- Part 3 Offer Preparation Instructions: provides Offerors with instructions on how to prepare their offer to address the evaluation criteria specified;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the offer, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by offerors; and
- Part 7 7A, Standing Offer, and 7B, Resulting Contract Clauses:
 - 7A includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;
 - 7B includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes include the Statement of Work, the Basis of Payment, the Electronic Payment Instruments, the Federal Contractor's Program for Employment Equity – Certification, the Technical and Financial Evaluation and the Evaluation Grids.

1.2 Summary

Through this solicitation, the Government of Canada (GC) is seeking offers from Offerors interested in providing advertising creative services for a variety of campaigns for the Government of Canada departments identified in Schedule I, I.1 and II of the *Financial Administration Act*, unless excluded by specific acts, regulations or Orders in Council. It will be used to authorize Standing Offers (SO).

GC Institutions falling outside these schedules may still be able to access these SOs. The Standing Offer Authority will review such requests on a case-by-case basis to determine feasibility.

The period of these SOs will be from the date of issuance until March 31, 2020 inclusively with the option to extend the period of the Standing Offers by up to three (3) additional one-year periods.

The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).

The requirement is limited to Canadian goods and/or services.

This RFSO for national advertising services is one of two solicitations to establish procurement instruments for the provision of advertising services. The other solicitation that compliments this solicitation is:

EP361-XXXXXX/A Request for Standing Offer for aboriginal set-aside advertising services to establish a Standing Offer with up to three (3) different Offerors to be used for call-ups valued up to **\$850,000.00** (excluding Applicable Taxes).

1.3 Debriefings

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing or by telephone.

1.4 Standing Offers

It is anticipated that a maximum of twelve (12) Departmental Individual Standing Offers (DISOs) for Advertising Services, which could be used for call-ups for advertising campaigns estimated at up to **\$850,000.00** (excluding Applicable Taxes) each, may result from this Solicitation. In the case of ties, additional DISOs may be issued. The total estimated value of Standing Offers resulting from this RFSO is between \$10M and \$15M.

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the RFSO 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.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2017-04-27) Standard Instructions – Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of 2006, Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 150 days

The 2006 standard instructions is amended as follows:

- Section 5, entitled Submission of offers, is amended as follows:
 - subsection 1 is deleted entirely and replaced with the following: "Canada requires that each offer, at RFSO closing date and time or upon request from the Standing Offer Authority, for example in the case of epost Connect service, be signed by the Offeror or by an authorized representative of the Offeror. If an offer is submitted by a joint venture, it must be in accordance with the section entitled Joint venture."
 - subsection 2.d is deleted entirely and replaced with the following: "send its offer only to the specified Bid Receiving Unit of Public Works and Government Service Canada (PWGSC) in the RFSO or to the specified address in the RFSO."

- subsection 2.e is deleted entirely and replaced with the following: "ensure that the Offeror's name, return address and procurement business number, RFSO number, and RFSO closing date and time are clearly visible on the offer; and"
- Section 6, entitled Late offers, is deleted entirely and replaced with the following: "PWGSC will return offers delivered after the stipulated RFSO closing date and time, unless they qualify as a delayed offer as described in the section entitled Delayed offers. For offers submitted using means other than Canada Post Corporation's epost Connect service, the physical offer will be returned. For offers submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service that contain access, records and information pertaining to a late offer will be deleted."
- Section 07, entitled Delayed offers, is amended as follows:
 - Subsection 1 is amended to add the following piece of evidence: "d. a CPC epost Connect service date and time record indicated in the epost Connect conversation activity;"
- Section 8, entitled Transmission by facsimile, is deleted entirely and replaced with the following section:

"Transmission by facsimile or by epost Connect

1. Facsimile

- a. Unless specified otherwise in the RFSO, offers may be submitted by facsimile. The only acceptable facsimile number for responses to RFSOs issued by PWGSC headquarters is 819-997-9776 or, if applicable, the facsimile number identified in the RFSO. The facsimile number for responses to RFSOs issued by PWGSC regional offices is identified in the RFSOs.
- b. For offers transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed offer including, but not limited to, the following:
 - i. receipt of garbled or incomplete offer;
 - ii. availability or condition of the receiving facsimile equipment;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the offer;
 - v. failure of the Offeror to properly identify the offer;
 - vi. illegibility of an offer; or
 - vii. security of offer data.
- c. An Offer transmitted by facsimile constitutes the formal offer of the Offeror and must be submitted in accordance with the section entitled Submission of offers.

2. ePost Connect

- a. Unless specified otherwise in the RFSO, offers may be submitted by using the [epost Connect service provided by Canada Post Corporation](https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a) (https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a).
- b. To submit an offer using epost Connect service, the Offeror must either:
 - i. send directly its offer only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
 - ii. send as early as possible, and in any case, at least six business days prior to the RFSO closing date and time, an email that includes the RFSO number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.

- c. If the Offeror is sending an email to the Bid Receiving Unit, the Bid Receiving Unit will then initiate an epost Connect conversation which will allow the Offeror to transmit its offer afterward at any time prior to the RFSO closing date and time. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Offeror to access the message within the conversation, and the Offeror can reply to the email notification by transmitting its offer.
- d. If the Offeror is using its own licensing agreement to send its offer, the Offeror must keep the epost Connect conversation open until at least 30 business days after RFSO closing date and time.
- e. The email address of PWGSC Bid Receiving Unit in Headquarters is: TPSGC.DGAreceptiondessomissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca. The RFSO number must be identified in the epost Connect message field of all electronic transfers.
- f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should an offeror not have a Canadian address, they may use the Bid Receiving Unit address specified on page 1 of the RFSO in order to register for the epost Connect service.
- g. For offers transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the offer including, but not limited to, the following:
 - i. receipt of a garbled or incomplete offer;
 - ii. availability or condition of the epost Connect service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the offer;
 - v. failure of the Offeror to properly identify the offer;
 - vi. illegibility of the offer;
 - vii. security of offer data; or
 - viii. inability to create an electronic conversation through the epost Connect service.
- h. An offer transmitted by epost Connect service constitutes the formal offer of the Offeror and must be submitted in accordance with the section entitled Submission of offers."

2.2 Submission of Offers

Offers 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 Request for Standing Offers.

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, offerors must provide the information required below before the issuance of a standing offer. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of Offers is completed, Canada will inform the Offeror 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 offer 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 CAF 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 Offeror a FPS in receipt of a pension? **Yes () No ()**

If so, the Offeror must provide the following information, for all FPS 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, Offerors agree that the successful Offeror'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 Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Offeror 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.

Signature

Date

2.4 Enquiries – Request for Standing Offer

All enquiries must be submitted in writing to the Standing Offer Authority no later than five (5) calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by Offerors 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 Offerors do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Offerors. Enquiries not submitted in a form that can be distributed to all Offerors may not be answered by Canada.

2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 Offerors.

2.6 Offerors' Teleconference (TBD)

An English language offerors' teleconference will be held at on Wednesday, January 31st, 2018. The teleconference will begin at 10:00 am.

The scope of the requirement outlined in the Request for Standing Offers (RFSO) will be reviewed during the conference and questions will be answered. It is recommended that Offerors who intend to submit an offer attend or send a representative.

Offerors are requested to communicate with the Standing Offer Authority before the conference to confirm attendance. Offerors should provide, in writing, to the standing Offer Authority, the name(s) of the person(s) who will be attending and a list of issues they wish to table no later than 3:00 pm on January 25th, 2018.

Any clarifications or changes to the RFSO resulting from the Offerors' conference will be included as an amendment to the RFSO. Offerors who do not attend will not be precluded from submitting an offer.

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

If the Offeror chooses to submit its offer electronically, Canada requests that the Offeror submits its offer in accordance with section 8 of the 2006 standard instructions and as amended in Part 2 - Offeror Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Offerors are required to provide their offer in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

The offer must be gathered per section and separated as follows:

Section I: Technical Offer

Section II: Financial Offer

Section III: Certifications

If the Offeror chooses to submit its offer in hard copies, Canada requests that the Offeror provides its offer in separately bound sections as follows:

Section I: Technical Offer (5 hard copies)
Creative Samples (1 electronic copy on USB)

Section II: Financial Offer (1 electronic copy on USB- **Alone on a separate USB key**)

Section III: Certifications (1 electronic copy on USB)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

Canada requests that Offerors follow the format instructions described below in the preparation of their offer:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the Request for Standing Offers.

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, Offerors 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 Offer

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

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Basis of Payment in Annex "B".

3.1.1 Electronic Payment of Invoices - Offer

If you are willing to accept payment of invoices by an Electronic Payment Instrument, complete Annex "C" Electronic Payment Instrument, to identify if it is accepted.

If Annex "C" Electronic Payment Instrument is not completed, it will be considered as if the Electronic Payment Instrument is not being accepted for payment of invoices.

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

Section III: Certifications

Offerors must submit the certifications and additional information required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offer including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

4.1.1 Technical Evaluation

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

4.1.2 Financial Evaluation

Financial evaluation criteria are included in Annex "E".

4.2 Basis of Selection

1. To be declared responsive, an offer must:
 - (a) comply with all the requirements of the Request for Standing Offers;
 - (b) meet all mandatory technical evaluation criteria; and
 - (c) obtain the required minimum points specified for each criterion for the technical evaluation;

The rating is performed on a scale of 400 points.

Offers not meeting (a), (b) or (c) will be declared non-responsive.

2. The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% for the price.
3. To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 80%.
4. To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.
5. For each responsive offer, the technical merit score and the pricing score will be added to determine its combined rating.

Neither the responsive offer that receives the highest number of points nor the one that proposed the lowest price will necessarily be accepted. The responsive offers with the highest combined technical and

financial score in accordance with the evaluation criteria will be recommended for issuance of a standing offer.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Offerors must provide the required certifications and additional information to be issued a standing offer.

The certifications provided by Offerors to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all Offerors must provide with their offer, **if applicable**, the declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

The certifications and additional information listed below should be submitted with the offer, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Standing Offer Authority will inform the Offeror 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 provided will render the offer non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real procurement agreement of 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 Offeror 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 – Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror 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-Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4>).

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the “FCP Limited Eligibility to Bid” list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

Canada will also have the right to terminate the Call-up 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 Standing Offer.

The Offeror must provide the Standing Offer Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before the issuance of a Standing Offer. If the Offeror is a Joint Venture, the Offeror must provide the Standing Offer 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 Issuance of a Standing Offer

5.2.3.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Offeror certifies that:

() the service offered is a Canadian service as defined in paragraph 2 of clause [A3050T](#).

Signature

Date

5.2.3.1.1 SACC Manual clause [A3050T](#) (2014-11-27) Canadian Content Definition

5.2.3.2 Status of Availability of Resources

5.2.3.2.1 SACC Manual Clause M3020T (2016-01-28) - Status of Availability of Resources – Offer

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Project Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement.

For the purposes of this clause, only the following reasons will be considered as beyond the control of the Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

NOTE: Replacement resources will be evaluated against the same criteria as posted in **1.2.3 EXPERIENCE OF THE OFFEROR – REQUIREMENT 3** below.

Signature

Date

5.2.3.3 Education and Experience

5.2.3.3.1 *SACC Manual* clause M3021T (2012-07-16) Education and Experience

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

Signature

Date

5.2.4 Capability of Resources

The Offeror or Joint Venture entity certifies that it has in-house resources, capable of meeting roles and responsibilities as outlined in Part 4, Services Required of Annex "A" Statement of Work.

() YES () NO

Signature

Date

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Financial Capability

SACC Manual clause M9033T (2011-05-16) Financial Capability

PART 7 – STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

7.1.1 The Offeror offers to perform the Work in accordance with the Statement of Work at Annex "A".

7.2 Security Requirements

7.2.1 There is no security requirement applicable to the Standing Offer.

7.3 Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) 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.

7.3.1 General Conditions

2005 (2017-06-21), General Conditions – Standing Offers – Goods or Services, apply to and form part of the Standing Offer.

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from date of issuance to March 31, 2020.

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for up to an additional three (3), one (1) year periods, under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority fifteen (15) days before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

7.5 Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

Name: Chris Ivany

Public Services and Procurement Canada, Communications Procurement Directorate

Address: 360 Albert Street, 12th Floor, Ottawa ON, K1A 0S5, Station 49

Telephone: (613) 993-0048

E-mail address: christopher.ivany@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

7.5.2 Project Authority

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.5.3 Program Authority

The Program Authority for this Standing Offer is the Advertising Coordination and Partnerships Directorate, Public Works and Government Services Canada.

The name and contact information is to be provided in the resulting Standing Offer document.

The Program Authority, PWGSC-ACPD, is responsible for reviewing advertising requirements (Statements of Work) and issuing project registration numbers for advertising initiatives, which departments must first obtain in order to contract advertising services through PWGSC - Communication Procurement Directorate. The Program Authority is also responsible for reviewing media plans for compliance with the Official Languages Act and the Federal Identity Program, and for issuing ADV numbers. It also coordinates the activities of the Agency of Record (AOR) for all media placements, and reports on GC-wide advertising.

7.5.4 Offeror's Representative

The Offeror's Representative for the Standing Offer is:

Name: _____

Telephone: ____-____-_____

E-mail address: _____

7.6 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is:

Public Services and Procurement Canada
Acquisitions Branch
Communication Procurement Directorate
Constitution Square, 12th Floor
360 Albert Street
Ottawa, Ontario K1A 0S5

7.7 Offeror Selection Methodology for the Standing Offers for Advertising Services

The Contracting Authority will proceed as follows to issue Call-ups against the Standing Offers for Advertising Services:

- (a) A proportional share of the total business will be assigned to each of the top twelve (12) Offerors based on the highest total score in accordance with the evaluation criteria.

Predetermined Distribution of the Resulting Work by Percentage

Ranking	Percentage of Resulting Work
1	9.33
2	9.33
3	9.33
4	8
5	8
6	8
7	8
8	8
9	8
10	8
11	8
12	8

NOTE: If ties result in additional SO's offered, the percentages of resulting work will be prorated accordingly.

- (b) The first twelve (12) Call-ups against a Standing Offer will be assigned based on initial ranking starting with the top ranked Offeror.
- (c) All subsequent Call-ups against a Standing Offer can be made with either of the three (3) Offerors that are furthest away from their shares as determined in paragraph (a) above. The Project Authority, in consultation with PWGSC, will make the individual selection based on Project Authority evaluation of the contractor's expertise. If one of the three (3) Offerors, furthest away from its share, has not been chosen for five (5) consecutive Call-ups against a Standing Offer, the next Call-up against a Standing Offer will automatically be offered to that Offeror.

NOTE: Should an Offeror withdraw his offer or should a Standing Offer be set aside, the share will be recalculated among the remaining Offerors based on their original offers.

NOTE: If there are fewer than twelve (12) compliant offers, the percentages will be adjusted accordingly.

7.8 Call-up Procedures

The Contracting Authority will proceed as follows to issue Call-ups against a Standing Offer:

- (a) The Contracting Authority will ensure that a Production package request has been issued as required through the AdMIS system by the Program Authority.
- (b) The Contracting Authority will provide the Offeror with a description of the task(s) to be performed. For each individual Call-up against a Standing Offer, Offerors will be approached and considered as described in Article 6. The Offeror will be given a maximum of twenty-four (24) hours turnaround time to state its availability to provide the services within the project time frame, unless the requirement is deemed urgent by the Project Authority, in which case the turnaround time would be shorter.
- (c) The Offeror will submit a project estimate for completion of the Work outlined in the Statement of Work to the Contracting Authority, within forty-eight (48) to ninety-six (96) hours (TBD with each requirement) of stating its availability, prior to commencement of the Work.
- (d) The project estimate will be established by multiplying the applicable rate(s) as specified in the Basis of Payment by the number of days and / or hours negotiated and agreed upon by the Client Department, the Supplier and, if necessary, the Contracting Authority. The breakdown of costs and the names of personnel shall be submitted with every proposal.
- (e) Travel and living expenses incurred under a Call-up against a Standing Offer will be reimbursed provided that prior approval from the Contracting Authority and Project Authority was obtained and that the expenses are in accordance with National Joint Council Travel Directive.
- (f) The Offeror will be authorized by the Contracting Authority to proceed with the Work by the issuance of a Call-up against a Standing Offer.
- (g) The delivery deadlines as negotiated and specified in the Call-up against a Standing Offer document must be adhered to.
- (h) The Offeror shall not undertake any of the specified Work unless and until a Call-up against a Standing Offer is issued by the Contracting Authority.

7.9 Call-Up Instrument

The Work will be authorized or confirmed by the Identified User issuing a Call-up against a Standing Offer.

7.10 Limitation of Call-Ups

Individual call-ups against the Standing Offer must not exceed \$850,000.00 (excluding Applicable Taxes).

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.

- (a) the call-up against the Standing Offer, including any annexes
- (b) the articles of the Standing Offer;
- (c) the general conditions 2005 (2017-06-21), General Conditions - Standing Offers - Goods or Services;
- (d) the general conditions 2035 (2016-04-04), General Conditions – Higher Complexity - Services;
- (e) Annex “A”, Statement of Work;
- (f) Annex “B”, Basis of Payment;
- (g) the Offeror’s offer dated _____.

7.12 Certifications and Additional Information

7.12.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror in default. Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO.

7.12.2 SACC Manual Clauses

<u>Number</u>	<u>Date</u>	<u>Description</u>
A9117C	2007/11/30	T1204 – Direct Request by Customer Department
A2000C	2006/06/16	Foreign Nationals (Canadian Contractor)
C0705C	2010/01/11	Discretionary Audit
M3800C	2006/08/15	Estimates
M3020C	2016/01/28	Status of Availability of Resources
M3060C	2008/05/12	Canadian Content Certification

7.13 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

7.14 Restrictive Provision

The Offeror represents and warrants that no gift, benefit or any pecuniary advantage or other inducement has been or will be paid, given, promised or offered directly or indirectly to the Offeror by any third party, including media outlets in relation to the performance of the Work.

7.15 Conflicting Interests

Subject to subsection (2), the Offeror represents, warrants and shall ensure that, to its knowledge, the services to be provided pursuant to the Standing Offer (the “services”) are not creating, and will not create, during the course of the Standing Offer period a conflict with competing or opposing interests of other clients of the Offeror.

Where the Offeror is aware that the services are or may be in conflict with competing or opposing interests of the Offeror, the Offeror shall identify the potentially competing services and interests involved, and forthwith offer an explanation setting out the reasons why the situation would not represent a conflict of interest.

Where Canada becomes aware that the services are or may be in conflict with competing or opposing interests of the Offeror, Canada shall inform the Offeror of this situation, requesting an explanation setting out the reasons why the situation would not represent a conflict of interest.

Following a review of the Offeror's explanation, Canada may accept or reject the explanation, at the sole discretion of Canada. Canada shall deliver its decision in writing. The Offeror shall have a ten (10) working day period, from the date of receipt of the Canada's decision, to submit either a supplementary or an alternate explanation. Following a review of the Offeror's supplementary or alternate explanation, if any, Canada may either accept and agree with this supplementary explanation, or, at the sole discretion of Canada, proceed to the measures set out in subsection (5).

Where Canada rejects the Offeror's initial explanation (or supplementary or alternate explanation, if any) referred to in subsection (4), Canada will set-aside any Standing Offer and treat any resulting Call-up against a Standing Offer as being in default.

B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

7.1 Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

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

7.3 Term of Contract

7.3.1 Period of the Contract

The Work must be completed in accordance with the call-up against the Standing Offer.

7.3.2 Delivery Date

Delivery must be completed in accordance with the call-up against the Standing Offer.

7.4 Payment

7.4.1 Basis of Payment

The Contractor will be paid in accordance with the attached ANNEX "B" (Basis of Payment) for Work performed pursuant to a Call-up against a Standing Offer and subject to acceptance by the Project Authority.

7.4.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75% committed; or
 - b. four months before the contract expiry date; or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.4.3 Method of Payment

SACC Manual Clause H1008C (2008/05/12) – Monthly Payment

7.4.4 Electronic Payment of Invoices – Call-Up

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

NOTE: List will be determined based on Offeror's selections in Annex "C" Electronic Payment Instruments.

7.5 Invoicing Instructions

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:

- a. a copy of time sheets to support the time claimed;
- b. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- c. a copy of the monthly progress report.

2. Invoices must be distributed as follows:

The original and one (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.6 Authorities

7.6.1 Contracting Authority

The Contracting Authority for the Call-up will be identified in the resulting Call-up against the Standing Offer.

The Contracting Authority is responsible for the management of the Call-up, and any changes to the Call-up 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.

7.6.2 Project Authority

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.6.3 Program Authority

The Program Authority for this Standing Offer is the Advertising Coordination and Partnerships Directorate, Public Works and Government Services Canada.

The Program Authority, PWGSC-ACPD, is responsible for reviewing advertising requirements (Statements of Work) and issuing project registration numbers for advertising initiatives, which departments must first obtain in order to contract advertising services through PWGSC - Communication Procurement Directorate. The Program Authority is also responsible for reviewing media plans for compliance with the Official Languages Act and the Federal Identity Program, and for issuing ADV numbers. It also coordinates the activities of the Agency of Record (AOR) for all media placements, and reports on GC-wide advertising.

7.7 Basis for Canada's Ownership of Intellectual Property

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

ANNEX "A" STANDING OFFER FOR ADVERTISING SERVICES

1. Background

The Government of Canada (GC) is seeking to establish Standing Offers for advertising services with a number of Suppliers. *The GC defines advertising as any messages conveyed in Canada or abroad and paid for by the government for placement in the media, including but not limited to: newspapers, television and cinema, radio, billboards and other out-of-home media, mobile devices, the Internet and any other digital media.*

Advertising is an important way for the GC to communicate with Canadians. The GC uses advertising to support its social, economic and cultural objectives to ensure that Canadians are informed of services, programs, initiatives and policies. Advertising is also an essential tool to alert the population about environmental and public health and safety issues, invite consultation on matters of public interest, and notify people about their legal rights and obligations. All federal advertising is conducted in accordance with the Treasury Board of Canada's *Policy on Communications and Federal Identity*.

The resulting GC Standing Offers will be accessed as needed for advertising requirements of GC institutions identified in Schedules I, I.1 and II of the Financial Administration Act (FAA), located at: www.justice.gc.ca, unless excluded by specific acts, regulations or Orders in Council. Note that the resulting Standing Offers will be subject to any relevant Government of Canada policy changes, if and when they occur.

GC Institutions falling outside these schedules may still be able to access these SOs. The Standing Offer Authority will review such requests on a case-by-case basis to determine feasibility.

This document outlines the services that an advertising agency will be expected to respond to under these Standing Offers.

It is important to note that all GC advertising is produced in both official languages of Canada. For more information about federal Acts and regulations as they relate to GC advertising, please refer to section 5.1.

The GC's advertising function is managed in a coordinated approach with a decentralized delivery system. A description of the roles and responsibilities of the key institutions and organizations that are responsible for the management of advertising is available at the following website: <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications/advertising-requirements.html>

All media planning, negotiations and buying services (including "media partnerships") are conducted exclusively by the GC's Agency of Record (AOR), subject to current policy, and, therefore, are not included in this requirement. Advertising agencies must coordinate all media negotiations through the AOR. Public opinion research, including the Advertising Campaign Evaluation Tool (ACET), does not form part of this requirement. There may also be requirements to work with other suppliers, related to marketing initiatives, in the execution of advertising campaign services as coordinated by institutions.

The annual reports on the GC's advertising activities can be found at the following Web site: <http://www.tpsgc-pwgsc.gc.ca/pub-adv/index-eng.html>

2. Overview

The Government of Canada establishes an annual advertising plan based on its priorities. Funds are allocated to individual institutions through a centralized process based on an annual advertising plan and this generally results in approximately 30 or more campaigns each year ranging in scope and budget.

Total annual advertising expenditures are approximately \$40-\$45 million for planning, production and media buys.

2.1 Required Services

The following services may be required:

- Account management and coordination services
- Strategic services
- Creative and production services

2.2 Approval Process

The GC advertising approval process can be long, cumbersome, and multi-level – this impacts the timely delivery of campaigns. The Supplier may be working under very short timeframes as most of the requests are on an urgent or time limited basis. No rush charges will be paid as it is understood that this is the nature of the work.

2.3 Nature of Work/Timelines

The process of developing and implementing a GC advertising campaign consists of:

- Consulting with the client, discussing the requirement in depth, developing the strategy;
- Liaising with the Agency of Record for technical requirements and media strategy, and possibly other marketing related suppliers.
- Developing creative concepts (based on the strategy);
- Finalizing concepts – for testing or for final approvals;
- Producing creative assets and trafficking them as per Section 4.4.

Typically, the first step of the process is considerably abbreviated and creative concepts are required very shortly after the Supplier is engaged.

3. Project Management Overview

As part of its normal service delivery, the Suppliers will be responsible to adhere to the following project management principles.

3.1 Commitment and Resources

- Commit to providing the best value for services to the GC from concept to execution of advertising services.
- Fairly represent the Supplier's knowledge and capabilities to meet the assignment objectives.
- Ensure availability of agency resources and that qualified personnel is applied to meet the objectives, deadlines, quality standards and budget, as outlined by the Project Authority (PA) for a specific advertising requirement.
- Demonstrate a high level of responsiveness and the ability to react quickly.
- Exhibit financial reliability and administrative control through documented processes for all transactions on behalf of government business.

3.2 Confidentiality and Conflict

- Acknowledge the responsibility to treat information and strategies from the GC as strictly confidential, and only make available to employees and outsourced suppliers on an as-and-when-needed basis.
- Make disclosure if the Supplier is coincidentally contracted with another client that has advertising and communication needs that are counter to the interests of the specific objectives to the Standing Offer in question.

3.3 Financial Control and Verification

3.3.1 Information Management

- Document the internal processes that are used by the advertising agency to track project(s).
- Document internal processes for financial controls in managing the budget and monitoring labour costs for the work related to the project(s).

3.3.2 Budget Control

- Implement a budget control procedure in a manner agreed to by the PA at the outset of the assignment. The budget control must record released funds and must contain detailed planned, actual and adjusted costs. The advertising budget control system must ensure that all funds and expenditures in the client's account are properly recorded and auditable.
- Prior to making any changes to the objectives and strategies contained in the SOW, it is mandatory that those additional costs always be authorized by the PA and that an amendment to the Contract against a Standing Offer be issued by PWGSC to reflect the additional cost prior to production or realization.

3.3.3 Audit Trail

- Maintain documents and records for the purpose of verifying any production or other orders, and invoices from outside suppliers for expenses which the advertising agency has incurred on behalf of, and re-billed to the GC. These documents and records are to be maintained for a period of six (6) years from date of final payment.

3.3.4 Time and Staff Remuneration

- An hourly rate system will be the basis of payment for the Standing Offer. The advertising agency shall specify all actual hours in respect to the specific assignment, and in respect of each individual staff member with an allocation of time by number of hours per day and date. Time and staff must be monitored by the advertising agency so as not to exceed the budget for remuneration.

4. Services Required

The SOW for a contract against a Standing Offer could encompass the following services:

- **Account Management and Coordination Services**
 - Account management
 - Account coordination
- **Strategic Services**
 - Strategic planning and development
- **Creative and Production Services**
 - Creative direction
 - Graphic design
 - Copy writing and copy editing (English or French)

- Translation, adaptation and proofreading/quality control for:
 - English or French
 - Aboriginal languages
 - Ethnic languages
- Production management and production services for:
 - Print
 - Broadcast
 - Out-of-Home
 - Digital
 - Cinema
- **Media Services**
 - Media distribution (trafficking)

4.1 Account Management and Coordination Services

Account management and coordination services include:

- Day-to-day development and execution of account management and coordination services to develop and produce advertising materials including:
 - Providing contact reports and budget reports detailing the monitoring of developing campaigns;
 - Providing budgets and timetables;
 - Producing estimates for approval;
 - Advising of budget variances;
 - Facilitating creative production.
- Documentation of all activities in all categories of service and all direct costs that include the level of effort (time and resources) to deliver the services required by the PA and production of cost reports, budgets, estimates, work schedules, and obtaining client approvals prior to production.
- Attend client briefings and meetings, and participate in conference calls as required.
- Supervision and reporting on any work produced by approved sub-contractors.

4.2 Strategic Planning and Development

Strategic planning and development services include:

- Developing a strategy or communication plan for advertising services (including, if required, supporting marketing materials) to achieve the goals of the advertising campaign – this may require expertise in specific areas as defined in the Contract against the Standing Offer. This may also include review of secondary research including consumer and market research, target market analyses, proprietary research tools, etc. that will support the strategic recommendations.
- Production of a strategy and/or communications plan which can include:
 - Objectives;
 - Branding considerations;
 - Target audience identification;
 - Key messages;
 - Creative strategy and concepts (artwork and layout);
 - Recommendation for research and creative pre-testing, as required;
 - Supporting marketing materials, if required;
 - Budget;
 - Timing;
 - Rationale;
 - Deliverables;
 - Indicated actions and next steps;

- Evaluation process.
- Ensuring that the strategy has signed authorization by the PA prior to implementation.

4.3 Creative and Production Services

Creative and production services include:

- Development of the overall creative concept and approach for the advertising campaign (including supporting marketing materials, if required).
- Overseeing and providing direction on overall quality of all creative elements, concepts, development, and production of all advertising products and potentially any marketing materials developed in support of the advertising products by in-house resources and sub-contractors.
- Developing creative materials (copy and artwork, in English and French, for broadcast, digital, out-of-home, cinema, print, videos, marketing materials, etc.) that flow from the approved overall creative approach.
- Providing or managing the translation and adaptation of materials in both official languages, in ethnic languages and in Indigenous languages, as required.
- Providing quality control for production of creative products including proofreading of copy to ensure accuracy, equivalency in the two official languages, and proofreading for ethnic and Indigenous languages, as required.
- Providing production management, supervision and quality control services for advertising (including multi-media) products such as, but not limited to, broadcast, digital (including videos for social media platforms), out-of-home, cinema, and print, as well as marketing/partnership materials taking into account the creative content constraints detailed in Appendix A
- Production management services include, but are not limited to:
 - Accurately estimating costs;
 - Negotiating with production sub-contractors;
 - Establishing contingency plans in case of unforeseen events;
 - Following required tendering processes for sub-contracting;
 - Obtaining legal clearance for intellectual property;
 - Negotiating copyright on behalf of the Crown;
 - Casting, negotiating, contracting and paying talent and residuals; and
 - Obtaining and documenting talent releases.

All "Studio Services" including items such as file retrieval, burning CDs, uploads to extranet, mounting and mock-ups, etc., to support the development of advertising and marketing materials must be included within the production services category of services under the areas of service identified above.

4.4 Media Distribution (Trafficking):

The AOR will provide the Supplier with all material deadlines and technical requirements. When extensions are required, the Supplier and the AOR will consult to determine which organization is in the best position to negotiate extensions.

Media distribution services include:

- Confirming creative material titles, codes, telecaster numbers and rotation (if more than one creative) to the AOR, so that the AOR can issue the traffic instructions to the media suppliers.
- Ensuring delivery of creative material in proper formats to each media supplier in a timely fashion, except for internet creative material, which should be sent to the AOR for trafficking.
 - Broadcast: The AOR will issue a list of purchased stations to the Supplier. The AOR will coordinate with the Supplier to complete the traffic instructions, i.e., creative material titles,

codes, telecaster numbers and rotation information (if more than 1 creative), and will send these to the stations. It is the Supplier's responsibility to obtain the telecaster number and other necessary approvals. The Supplier will order the broadcast dubs (copies) from a dubbing and distribution house of their choosing, which will send the material to the stations. These costs will be assumed by the Supplier under its production budget.

- Print: The AOR will supply links to media suppliers' technical specifications for creative production; this will also be included in media plans along with material delivery dates. The AOR will communicate with the Supplier to obtain creative material titles, codes and creative rotation, if any, and indicate the information on insertion orders. The Supplier will send out the material.
- All other media (except Internet): The AOR will supply links to the suppliers' technical specifications on the list of contact information for suppliers (as no cost guide exist for these media). This information will also be indicated in media plans, along with material delivery dates. The AOR will send instructions to the suppliers based on creative information provided by the Supplier (i.e., creative material titles, codes, rotation information). The Supplier will send out the material.
- Internet: The Supplier will send the creative material to the AOR that will traffic the material through the Advertising Technology Partner's ad server or through the media suppliers' ad server, and ensure appropriate tracking set-up.

Ad server services are not included in this requirement. This service is covered under contract with the AOR responsible for all services related to ad servers.

4.5 KEY PERSONNEL

For any personnel working in one of the two key resource categories of service, the Contractor should submit CV's to the Project Authority and obtain approval before the resource can start working under resulting contracts. No approval is required for personnel working in categories under the Blended Rate.

The key resource categories are:

- Account Director or Lead Strategist
- Creative Director

Each key resource that is proposed should have a minimum of seven (7) years of experience in the field for which they are being proposed.

The CVs should include the following information:

- The key category of service for which the individual is being proposed.
- Their experience in the advertising/marketing communications field presented in the following format, which identifies the company name, job title and years of employment:
 - Month/Year – Month/Year Company name Job title
- The number of years' experience in their proposed category of service.
- Education, professional accreditations and related professional development.
- Proficiency in English and French.
- One (1) example of a project completed in the last five (5) years before RFSO closing date, or the period following Standing Offer Issuance, that demonstrates the individual's expertise in the proposed category of service. The example should provide details on the dates, scope and size of the project as well as the individual's role and contribution.

5. Work and Contract Constraints

Contractors should be aware of the following constraints that will affect how the work must be done:

5.1 Policies, Acts and Standards

To ensure the integrity and efficacy of GC advertising, the Contractor must provide services and produce materials in compliance with the administrative policies of the GC issued by the Treasury Board (TBS), including, but not exclusive to, the following:

- The *Policy on Communications and Federal Identity* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683>) to ensure that communications across the GC are well coordinated, effectively managed and responsive to the diverse information needs of the public, and to ensure that advertising design and presentation conform to the requirements;
- The *Contracting Policy* (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=14494>) to ensure the quality and value of the work they contract out;
- The *Official Languages Act* (<http://laws-lois.justice.gc.ca/eng/acts/O-3.01/page-1.html#h-5>) (Sections 11 and 30) to ensure compliance in all advertising.
- The *Privacy Act* (<http://laws-lois.justice.gc.ca/eng/acts/P-21/>) to ensure proper privacy practices are incorporated and respected in the handling of personal information; and
- The *Standard on Web Accessibility* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601>) to ensure conformance with *Web Content Accessibility Guidelines* (WCAG) 2.0.

Other relevant standards can be found at <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications.html>

The Contractor must maintain financial records in support of PSPC responsibilities under the Financial Administration Act, and provide information in support of PSPC's responsibilities under the Access to Information Act. As well, the Contractor will ensure compliance with the relevant legislation of all Canadian jurisdictions where the campaign materials will be used.

5.2 Approval Process Constraints

The Supplier will be receiving requests from PWGSC on behalf of various institutions. The PA identified within each resulting contract will be responsible for providing written approval of all the Contractor's work, seeking all necessary approvals, providing written approvals of all work, receiving all final deliverable materials, and verifying that value for money has been obtained.

The Contractor will work with the PA to set a timeline for delivery and presentation of work including campaign briefs, campaign strategies, creative concepts, production of digital assets and post-campaign reports.

The PA will work with the Contractor to define and refine the messages and the development and design of materials to be applied to the campaign prior to getting approval from internal program colleagues and senior management. Final approval to proceed will be communicated to the Contractor by the PA. It is the PA's responsibility to seek all required approvals. The Contractor may be asked to provide presentation materials and / or to make presentations for this purpose.

Development of advertising and related materials requires significant internal communications. PSPC Strategic Communications, specific Program authorities as well as Deputy Ministers', Minister's Offices and the Privy Council Office (PCO) must be involved throughout this process. In addition, there are

significant stakeholder groups that will be informed of the approach being taken. These additional levels of approval may result in longer timeframes for approval prior to proceeding with specific projects. The Contractor should build in a two-week period for client approvals on each major milestone/deliverable in the campaign development process.

The Contractor must not place any GC advertisement in any advertising medium. In addition, materials must not be forwarded to media outlets prior to receiving the AOR's email acknowledgement of receipt of the work authorization (WA) and list of media outlets purchased, as applicable.

ANNEX "B"
BASIS OF PAYMENT

NOTE TO OFFERORS:

Offerors must submit an hourly rate for each of the two (2) key categories of services and one (1) blended hourly rate per group (see table below under B.1). The blended hourly rates to be submitted are the rates the Offeror will charge for any services not covered by the key categories, as outline below:

Group A

- Account Coordination
- Graphic Design/Conceptualization
- Copy Writing (English or French)
- Copy Editing (English or French)
- Production Services
- Media Distribution (Trafficking)

Group B

- Proofreading (English and French)
- Translation and Adaptation

The Supplier will be paid in accordance with the following basis of payment for work performed pursuant to any resulting call-up against the Standing Offer.

Offerors must include all agency charges in their hourly rates as no other agency fee or commission will be payable above these rates.

The hourly rates are firm and will be used in the evaluation.

1. FIRM HOURLY RATES

The firm hourly rates are all inclusive. They include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only Applicable Taxes. All expenses normally incurred in providing the services (i.e., project office space [including Offeror’s hardware and software], word processing, reports, work estimates, photocopying, courier and telephone charges, local travel and the like) are included in the firm hourly rate identified hereunder, and will not be permitted as direct charges under any Call-up against a Standing Offer. **The Offeror is not permitted to charge hourly rates to prepare work estimates.**

The rates must be in Canadian currency, customs and duties are included, and Applicable Taxes are extra.

Category of Service	Hourly Rate Standing Offer Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3
Account Director / Lead Strategist	\$ _____	\$ _____	\$ _____	\$ _____
Creative Director	\$ _____	\$ _____	\$ _____	\$ _____
Blended Rate A	\$ _____	\$ _____	\$ _____	\$ _____
Blended Rate B	\$ _____	\$ _____	\$ _____	\$ _____

2. PRODUCTION COSTS

The production costs are costs associated with the production of the ads and marketing/partnership activities and products, excluding the professional fees billed as hourly rate. Production costs will be reimbursed at cost, as subcontracted services and direct expenses.

3. SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditure reasonably and properly incurred to acquire goods and services from outside suppliers at the supplier's price, net of any trade or prompt payment discounts.

FOR EACH SUBCONTRACTED SERVICE OVER \$25,000.00 (APPLICABLE TAXES INCLUDED)

The Supplier will obtain competitive bids from no less than three (3) outside suppliers. The Supplier must provide to the Contracting Authority and the Project Authority, the names of the suppliers who submitted bids, the total amount of each bid obtained, the selection criteria and results.

4. DIRECT EXPENSES

The professional fees submitted in B.1 are all inclusive.

The Supplier will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers, given the service(s) is/are documented in the approved Contract resulting for a Standing Offer. All such direct expenses must have prior authorization of the Project Authority.

5. TRAVEL AND LIVING EXPENSES

The Supplier will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C 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".

All payments are subject to audit by Canada.

All travel must have prior authorization of the Project Authority.

6. CONTRACTUAL JOINT VENTURE (IF APPLICABLE)

The Offeror is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition, it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.

ANNEX “C” – ELECTRONIC PAYMENT OF INVOICES

Canada requests that Offerors complete option 1 or 2 below:

1. () Electronic Payment Instruments will be accepted for payment of invoices.

The following Electronic Payment Instrument(s) are accepted:

- () 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)

2. () Electronic Payment Instruments will not be accepted for payment of invoices.

The Offeror is not obligated to accept payment by Electronic Payment Instruments.

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

ANNEX "D" FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

I, the Offeror, by submitting the present information to the Standing Offer 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 an offer non-responsive, or may set-aside a Standing Offer, or will declare a contractor in default, if a certification is found to be untrue, whether during the offer evaluation period, during the Standing Offer period, or during the contract period. Canada will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply with any request or requirement imposed by Canada may render the Offer non-responsive, may result in the Standing Offer set-aside or constitute a default under the Contract. For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\)](#) website.

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

Complete both A and B.

A. Check only one of the following:

- A1. The Offeror certifies having no work force in Canada.
- A2. The Offeror certifies being a public sector employer.
- A3. The Offeror certifies being a federally regulated employer being subject to the *Employment Equity Act*.
- A4. The Offeror certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

A5. The Offeror has a combined workforce in Canada of 100 or more employees; and

- A5.1. The Offeror certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.

OR

- A5.2. The Offeror certifies having submitted the Agreement to Implement Employment Equity (LAB1168) to ESDC-Labour. As this is a condition to the issuance of a Standing Offer, 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 Offeror is not a Joint Venture.

OR

- B2. The Offeror 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)

ANNEX “E” TECHNICAL AND FINANCIAL EVALUATION

1. TECHNICAL EVALUATION

NOTE: The entire response to this Technical Evaluation should be limited to a maximum of 12 pages. Content in links/URL’s provided/submitted in the Offeror’s responses will not be evaluated. Certification requirements and Financial Evaluation submissions are not included in the 12 page limit.

NOTE: PSPC does not require or recommend Offerors to engage in any unpaid speculative work (i.e. strategy development, research etc.) to respond to these criteria. A combination of the Offerors existing knowledge combined with information provided in this RFSO should be used to formulate responses.

1.1 MANDATORY TECHNICAL CRITERIA

The Offeror MUST meet all the mandatory requirements of the RFSO.

Mandatory Technical Criteria	Met	Not Met
M1. Experience of Offeror		
M2. Certification Requirements		

M1. EXPERIENCE OF THE OFFEROR

The Offeror MUST submit two (2) examples of advertising campaigns which were completed* within the last five (5) years of the RFSO closing date with the following criteria (NB: the campaigns do not have to be ones undertaken for the Government of Canada):

- Each submitted campaign must have targeted a different audience (e.g., youth, general public, business, potential recruits, etc.)
- Each submitted campaign must have a different objective (e.g., raise awareness, change behaviour, encourage sign-up for service/product, encourage a member of the target audience to apply for a job, etc.)
- At least one campaign must have been produced in both official languages (English and French).
- At least one campaign must be an example of a national campaign (that is, delivered in at least three of the following five regions: Prairies/BC, Ontario, Quebec, Atlantic, northern Canada).
- At least one campaign must consist of a combination of both traditional media (television, radio, print, or video etc.) and digital/social media.
- At least one campaign must have had either the proposed Creative Director or Account Director/lead Strategist (see 1.2.3 - Requirement 3) involved in that role.

*Completed advertising campaign is one for which planning and production have been completed, tactics have been executed, and measured campaign results are known. While the campaign can be ongoing, a measurable phase or flight must be available to meet the definition.

M2. The Offeror MUST comply with the certification requirements as described in Part 5.

1.2 POINT RATED TECHNICAL CRITERIA

Rated Criteria	Minimum Points Required	Maximum Points
1.2.1 Experience of Offeror, requirement 1	120	200
1.2.2 Experience of Offeror, requirement 2	60	100
1.2.3 Experience of Offeror, requirement 3	60	100

Offerors that fail to meet the minimum points in each rated criterion will not be evaluated further and will be considered non-responsive.

1. The following scoring grid will be used for the evaluation of the rated criteria.
2. ONLY the percentage factors indicated in the table are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available percentage factors: 1, 2, 3, 4, 5 and 0. Factors such as 1.75, 2.5, etc. MUST NOT be used.
3. The "points" and "total points" boxes in the grids will be calculated based on the percentage factor(s) assigned. Evaluators MUST NOT select a number for "points" which does not correspond to a percentage factor. For example, 2.5/10 is not an acceptable score as 2.5 is not available.

Percentage Factor	Percentage of total	Rating Level
0	0%	No details provided as to how the Offeror meets the criteria. Unable to evaluate.
1	20%	Unacceptable - Very limited description. Many required elements missing.
2	40%	Weak - Limited description. Some required elements missing.
3	60%	Average - Partial description. A few required elements missing.
4	80%	Satisfactory - Complete description. All required elements evident.
5	100%	Strong - Comprehensive description. Response goes above and beyond simply satisfying the criteria.

1.2.1 EXPERIENCE OF THE OFFEROR – REQUIREMENT 1 (200 Points total – max 100 for each campaign submitted in accordance with M1.):

The answers provided in this section will assess how your agency analyzes an advertising challenge and how it “sells” its recommended approach to its clients (e.g., what type of data it uses, how it gathers and analyzes the data, how it identifies options, how it structures its recommendations). It will also assess how you work with your clients and how you deal with challenging situations.

1.2.1.1 Describe the campaign objectives, the target audience, the budget, the time lines, any constraints, and the expected results: 5 points

1.2.1.2 The approach/strategy can include, but is not limited to, the following: 30 points

- What data did you use and how did you use the data to arrive at the approach/strategy
- What key insights did you have (or uncover) that led to the strategy
- How did you develop strategic options
- How did you rank the strategic options, what considerations were used to rank the best option to achieve your client’s goals
- How did you package strategy/approach to present to your client in a compelling manner
- How did you present or sell your recommended strategy/approach to your client.

1.2.1.3 The advertising mix can include, but is not limited to, the following: 30 points

- How did the strategy/approach affect the advertising mix
- How did the campaign’s creative approach affect the advertising mix selected
- How did the campaign objectives affect the advertising mix selected

1.2.1.4 Summarize the campaign results. Your results should include not only peak performances but performances during the entire campaign period. Define key performance indicators, overall reach of the campaign, level of engagement with the target audience, results related to initially stated objectives. (In the event that results are considered business confidential by your client, please provide the name and contact information of the client who can vouch for the campaign’s success.): 5 points

1.2.1.5 Challenges: 30 points

In working with your client on this campaign, what challenges did you face (apart from small budgets and short timelines). This can include, but is not limited to, things such as:

- Campaign objectives changed once strategy/approach was developed
- Creative approach rejected by senior management
- Non-responsive client despite short timelines

1.2.2 EXPERIENCE OF THE OFFEROR – REQUIREMENT 2 (100 POINTS TOTAL)

To assess the ability of the offeror to work under pressure and deliver quality products when given a tight deadline, the Offeror should provide a description of how they would respond to the following situation.

Your agency has been working closely with a Government of Canada institution and has developed an advertising campaign that includes a mix of digital and traditional media. You have drafted and presented comprehensive strategy and advertising creative concepts which have received positive feedback at the working level, but do not yet have senior management approval.

The day before you anticipate final approval to start producing creative assets for campaign implementation, the institution indicates that it has been advised by senior management that a new creative direction is required because a new key piece of information (or a new key audience) needs to be incorporated into the strategy and the creative elements. You have been asked to address this as soon as possible.

What do you do?

Please describe your approach to address this situation and how you would attempt to mitigate the situation. This can include, but is not limited to, things such as:

- how do you clarify the new requirements;
- how do you address the new requirements within a very limited time frame;
- what resources (or additional resources) do you bring into the team;
- how do you ensure that the correct contracting documentation is in place as (and before) you undertake any required work;
- how do you ensure quality control for language (English, French, and ethnic or Indigenous, as required) and creative elements.

1.2.3 EXPERIENCE OF THE OFFEROR – REQUIREMENT 3 (100 POINTS TOTAL)

To assess the qualifications of the professional staff that will be assigned to the GC advertising accounts, please provide the CV of the following two resources:

- Creative Director (note that this may not necessarily be the title of the resource – this is the person who provides the creative strategy and oversight): 50 points
- Account Director or lead Strategist (note that this may not necessarily be the title of the person – this is the person who provide overall direction/management of the account and the client relationship OR the person who provides the overall strategic guidance and oversight for the account): 50 points.

Each of these resources should have a minimum of 7 years of experience in the field for which they are being proposed. In addition, aside from standard elements of a CV (e.g., education, awards, places of employment and titles at those places), the CV should include the following elements:

- Demonstrated ability to deal with complex clients/complex client environments (define the complexity and how the resource managed projects to successfully navigate the complexity);
- A key professional accomplishment in the advertising field (describe the accomplishment, how specifically the resource contributed to the accomplishment, and why the accomplishment is important/what it demonstrates about the resource)
- The specific contribution the resource made in the campaign(s) submitted for Requirement 1 (1.2.1).

2. FINANCIAL EVALUATION

The figures below are for demonstration purposes only and do not represent current or expected hourly rates for advertising services.

To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.

The financial scores will be calculated as follows:

Step 1: For each Offeror, an average hourly rate per category of service will be calculated using the rates submitted for each of the periods of the Standing Offer.

Example of Step 1:

Firm A

Category of Service	Hourly Rate SO Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3	Average Rate
Account Director / Lead Strategist	\$125	\$125	\$125	\$125	\$125
Creative Director	\$150	\$150	\$150	\$150	\$150
Blended rate A	\$135	\$135	\$135	\$135	\$135
Blended rate B	\$110	\$110	\$110	\$110	\$110

Firm B

Category of Service	Hourly Rate SO Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3	Average Rate
Account Director / Lead Strategist	\$150	\$155	\$160	\$160	\$156.25
Creative Director	\$150	\$155	\$160	\$160	\$156.25
Blended rate A	\$150	\$155	\$160	\$160	\$156.25
Blended rate B	\$125	\$130	\$135	\$135	\$131.25

Firm C

Category of Service	Hourly Rate SO Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3	Average Rate
Account Director / Lead Strategist	\$120	\$125	\$130	\$135	\$127.50
Creative Director	\$120	\$125	\$130	\$135	\$127.50
Blended rate A	\$120	\$125	\$130	\$135	\$127.50
Blended rate B	\$50	\$50	\$50	\$60	\$52.50

Firm D

Category of Service	Hourly Rate SO Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3	Average Rate
Account Director / Lead Strategist	\$200	\$200	\$205	\$205	\$202.50
Creative Director	\$210	\$210	\$220	\$220	\$215
Blended rate A	\$175	\$175	\$180	\$180	\$177.50
Blended rate B	\$150	\$150	\$150	\$150	\$150

Firm E

Category of Service	Hourly Rate SO Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3	Average Rate
Account Director / Lead Strategist	\$250	\$250	\$250	\$250	\$250
Creative Director	\$200	\$200	\$200	\$200	\$200
Blended rate A	\$250	\$250	\$250	\$250	\$250
Blended rate B	\$200	\$200	\$200	\$200	\$200

Step 2: The highest and lowest average hourly rate per category of service will be removed prior to calculation the overall average rate per category. If there are three or fewer Offerors, no hourly rates will be removed.

Example of Step 2:

Offeror	Account Director / Lead Strategist	Creative Director	Blended rate A	Blended rate B
FIRM A	\$125	\$150	\$135	\$110
FIRM B	\$156.25	\$156.25	\$156.25	\$131.25
FIRM C	\$127.50	\$127.50	\$127.50	\$52.50
FIRM D	\$202.50	\$215	\$177.50	\$150
FIRM E	\$250	\$200	\$250	\$200
OVERALL AVERAGE	\$162.08	\$168.75	\$156.25	\$130.42

Step 3: If any Offeror’s average hourly rate per category is more than 50% below or 100% above the overall average of a category of service, its offer will be considered non-responsive.

Example of Step 3:

Offeror	Account Director / Lead Strategist	Creative Director	Blended rate A	Blended rate B
FIRM A	\$125	\$150	\$135	\$110
FIRM B	\$156.25	\$156.25	\$156.25	\$131.25
FIRM C	\$127.50	\$127.50	\$127.50	\$52.50
FIRM D	\$202.50	\$215	\$177.50	\$150
FIRM E	\$250	\$200	\$250	\$200
OVERALL AVERAGE	\$162.08	\$168.75	\$156.25	\$130.42
Maximum Responsive	\$324.16	\$337.50	\$312.50	\$260.84
Minimum Responsive	\$81.04	\$84.38	\$78.13	\$65.21

The offer from Firm C would be non-responsive as it did not meet the minimum responsive hourly rate for the Blended Rate B.

Step 4: The weighted Financial Score will be determined per category of service

Example of Step 4:

$$\frac{\text{Lowest Responsive Hourly Rate}}{\text{Offeror's Hourly rate}} \times 5 = \text{Weighted Financial Score per Category}$$

OFFEROR	Account Director / Lead Strategist	Weighted Financial Score
FIRM A	\$125	5.00
FIRM B	\$156.25	4.00
FIRM D	\$202.50	3.09
FIRM E	\$250	2.50

OFFEROR	Creative Director	Weighted Financial Score
FIRM A	\$150	5.00
FIRM B	\$156.25	4.80
FIRM D	\$215	3.49
FIRM E	\$200	3.75

OFFEROR	Blended Rate A	Weighted Financial Score
FIRM A	\$135	5.00
FIRM B	\$156.25	4.32
FIRM D	\$177.50	3.80
FIRM E	\$250	2.70

OFFEROR	Blended Rate B	Weighted Financial Score
FIRM A	\$110	5.00
FIRM B	\$131.25	4.19
FIRM D	\$150	3.67
FIRM E	\$200	2.75

Step 5: The Total Financial Score will be calculated by adding all of the weighted Financial Scores per category.

OFFEROR	Account Director / Lead Strategist	Creative Director	Blended rate A	Blended rate B	TOTAL FINANCIAL SCORE
FIRM A	5.00	5.00	5.00	5.00	20.00
FIRM B	4.00	4.80	4.32	4.19	17.31
FIRM D	3.09	3.49	3.80	3.67	14.05
FIRM E	2.50	3.75	2.70	2.75	11.70

ANNEX “F” – EVALUATION GRIDS

EVALUATION SUMMARY		
MANDATORY REQUIREMENTS	_____ MET	_____ NOT MET
Mandatories checked by:		Date:
RATED REQUIREMENTS		SCORE ACHIEVED
1.2.1 EXPERIENCE OF THE OFFEROR – REQUIREMENT 1		
Campaign 1		
Campaign Objectives		_____ / 5
Approach/Strategy		_____ / 30
Advertising Mix		_____ / 30
Results Summary		_____ / 5
Challenges		_____ / 30
Campaign 2		
Campaign Objectives		_____ / 5
Approach/Strategy		_____ / 30
Advertising Mix		_____ / 30
Results Summary		_____ / 5
Challenges		_____ / 30
TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 1		_____ / 200
1.2.2 EXPERIENCE OF THE OFFEROR – REQUIREMENT 2		
Description of Approach		_____ / 100
TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 2		_____ / 100
1.2.3 EXPERIENCE OF THE OFFEROR – REQUIREMENT 3		
Account Director or Lead Strategist		_____ / 50
Creative Director		_____ / 50
TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 3		_____ / 100
TOTAL		_____ / 400

1.2.1 EXPERIENCE OF THE OFFEROR – REQUIREMENT 1 (200 Points total – max 100 for each campaign submitted in accordance with M1.):

1.2.1.1 - Up to 5 points each		
Assessment of criteria	Percentage Factor	Points
Describe the campaign objectives, the target audience, the budget, the time lines, any constraints, and the expected results.	Campaign One _____	____ / 5
	Campaign Two _____	____ / 5
Comments: Campaign One: Campaign Two:		

1.2.1.2 - Up to 30 points each		
Assessment of criteria	Percentage Factor	Points
The approach/strategy can include, but is not limited to, the following: <ul style="list-style-type: none"> ▪ What data did you use and how did you use the data to arrive at the approach/strategy ▪ What key insights did you have (or uncover) that led to the strategy ▪ How did you develop strategic options ▪ How did you rank the strategic options, what considerations were used to rank the best option to achieve your client’s goals ▪ How did you package strategy/approach to present to your client in a compelling manner ▪ How did you present or sell your recommended strategy/approach to your client. 	Campaign One _____	____ / 30
	Campaign Two _____	____ / 30
Comments: Campaign One: Campaign Two:		

1.2.1.3 - Up to 30 points each		
Assessment of criteria	Percentage Factor	Points
The advertising mix can include, but is not limited to, the following: <ul style="list-style-type: none"> ▪ How did the strategy/approach affect the advertising mix ▪ How did the campaign’s creative approach affect the advertising mix selected ▪ How did the campaign objectives affect the advertising mix selected 	Campaign One _____	____ / 30
	Campaign Two _____	____ / 30

Comments: Campaign One: Campaign Two:

1.2.1.4 - Up to 5 points each		
Assessment of criteria	Percentage Factor	Points
Summarize the campaign results. Your results should include not only peak performances but performances during the entire campaign period. Define key performance indicators, overall reach of the campaign, level of engagement with the target audience, results related to initially stated objectives. (In the event that results are considered business confidential by your client, please provide the name and contact information of the client who can vouch for the campaign's success.)	Campaign One _____	____ / 5
	Campaign Two _____	____ / 5
Comments: Campaign One: Campaign Two:		

1.2.1.5 - Up to 30 points each		
Assessment of criteria	Percentage Factor	Points
Challenges: In working with your client on this campaign, what challenges did you face (apart from small budgets and short timelines). This can include, but is not limited to, things such as: <ul style="list-style-type: none"> ▪ Campaign objectives changed once strategy/approach was developed ▪ Creative approach rejected by senior management ▪ Non-responsive client despite short timelines 	Campaign One _____	____ / 30
	Campaign Two _____	____ / 30
Comments: Campaign One: Campaign Two:		

TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 1: _____ / 200 Points

1.2.2 EXPERIENCE OF THE OFFEROR – REQUIREMENT 2 (100 POINTS TOTAL):

1.2.2 - Up to 100 points		
Assessment of criteria	Percentage Factor	Points
To assess the ability of the Offeror to work under pressure and deliver quality products when given a tight deadline, the		____ / 100

<p>Offeror should provide a description of how they would respond to the following situation.</p> <p>Your agency has been working closely with a Government of Canada institution and has developed an advertising campaign that includes a mix of digital and traditional media. You have drafted and presented comprehensive strategy and advertising creative concepts which have received positive feedback at the working level, but do not yet have senior management approval.</p> <p>The day before you anticipate final approval to start producing creative assets for campaign implementation, the institution indicates that it has been advised by senior management that a new creative direction is required because a new key piece of information (or a new key audience) needs to be incorporated into the strategy and the creative elements. You have been asked to address this as soon as possible.</p> <p>What do you do? Please describe your approach to address this situation and how you would attempt to mitigate the situation. This can include, but is not limited to, things such as:</p> <ul style="list-style-type: none"> ▪ how do you clarify the new requirements; ▪ how do you address the new requirements within a very limited time frame; ▪ what resources (or additional resources) do you bring into the team; ▪ how do you ensure that the correct contracting documentation is in place as (and before) you undertake any required work; ▪ how do you ensure quality control for language (English, French, and ethnic or Indigenous, as required) and creative elements. 		
<p>Comments:</p>		

TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 2: _____ / 100 Points

1.2.3 EXPERIENCE OF THE OFFEROR – REQUIREMENT 3 (100 POINTS TOTAL):

<p style="text-align: center;">Account Director or Lead Strategist - Up to 50 points</p>		
<p>Assessment of criteria</p>	<p>Percentage Factor</p>	<p>Points</p>
<p>This resource should have a minimum of 7 years of experience in the field for which they are being proposed. In addition, aside from standard elements of a CV (e.g., education, awards, places</p>		<p style="text-align: center;">_____ / 50</p>

<p>of employment and titles at those places), the CV should include the following elements:</p> <ul style="list-style-type: none"> ▪ Demonstrated ability to deal with complex clients/complex client environments (define the complexity and how the resource managed projects to successfully navigate the complexity); ▪ A key professional accomplishment in the advertising field (describe the accomplishment, how specifically the resource contributed to the accomplishment, and why the accomplishment is important/what it demonstrates about the resource) ▪ The specific contribution the resource made in the campaign(s) submitted for Requirement 1. 		
<p>Comments:</p>		

<p align="center">Creative Director - Up to 50 points</p>		
<p>Assessment of criteria</p>	<p>Percentage Factor</p>	<p>Points</p>
<p>This resource should have a minimum of 7 years of experience in the field for which they are being proposed. In addition, aside from standard elements of a CV (e.g., education, awards, places of employment and titles at those places), the CV should include the following elements:</p> <ul style="list-style-type: none"> ▪ Demonstrated ability to deal with complex clients/complex client environments (define the complexity and how the resource managed projects to successfully navigate the complexity); ▪ A key professional accomplishment in the advertising field (describe the accomplishment, how specifically the resource contributed to the accomplishment, and why the accomplishment is important/what it demonstrates about the resource) <p>The specific contribution the resource made in the campaign(s) submitted for Requirement 1.</p>		<p align="center">____ / 50</p>
<p>Comments:</p>		

TOTAL FOR EXPERIENCE OF THE OFFEROR – REQUIREMENT 3: ____ / 100 Points