

RETURN BIDS TO:

National Energy Board
Suite 210, 517 Tenth Avenue SW
Calgary, AB, Canada T2R 0A8
Bid Email: proposals.propositions@neb-one.gc.ca

REQUEST FOR PROPOSAL

Comments

This documents contain security requirement.

Proposal To: National Energy Board

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 thereof.

On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

Title		
Executive Search Services		
Solicitation No.		Date
84084-17-0144		2018-01-30
Solicitation Closes		Time Zone
at	02 :00 PM – 14h00	Mountain Standard Time (MST)
on	2018-02-14	
F.O.B.		
Plant:	<input type="checkbox"/>	Destination: <input checked="" type="checkbox"/> Other: <input type="checkbox"/>
Address inquiries to:		
Jenny Gong		
Area code and Telephone No.		Facsimile No. / E-mail
		Jenny.gong@neb-one.gc.ca
Destination – of Goods, Services, and Construction:		
Calgary, AB		

Instructions: See Herein

Delivery required	Delivery offered
See Herein	
Vendor/firm Name and Address	
Telephone No.	
E-mail	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)	
Signature	Date

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION	3
1.1 SECURITY REQUIREMENTS	3
1.2 STATEMENT OF WORK.....	3
1.3 DEBRIEFINGS	3
1.4 TRADE AGREEMENTS	3
1.5 CANADIAN CONTENT	3
PART 2 - BIDDER INSTRUCTIONS	3
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS.....	3
2.2 SUBMISSION OF BIDS.....	4
2.3 FORMER PUBLIC SERVANT.....	4
2.4 ENQUIRIES - BID SOLICITATION.....	5
2.5 APPLICABLE LAWS.....	5
PART 3 - BID PREPARATION INSTRUCTIONS.....	6
3.1 BID PREPARATION INSTRUCTIONS	6
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION	7
4.1 EVALUATION PROCEDURES.....	7
4.2 BASIS OF SELECTION - HIGHEST COMBINED RATING OF TECHNICAL MERIT AND PRICE	7
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	8
5.1 CERTIFICATIONS REQUIRED WITH THE BID.....	8
5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION	9
PART 6 - RESULTING CONTRACT CLAUSES	10
6.1 SECURITY REQUIREMENTS.....	10
6.2 STATEMENT OF WORK.....	11
6.3 STANDARD CLAUSES AND CONDITIONS	11
6.4 TERM OF CONTRACT	11
6.5 AUTHORITIES	11
6.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS	12
6.7 PAYMENT	12
6.8 INVOICING INSTRUCTIONS - PROGRESS PAYMENT CLAIM - SUPPORTING DOCUMENTATION NOT	13
REQUIRED.....	13
6.9 CERTIFICATIONS AND ADDITIONAL INFORMATION.....	14
6.10 APPLICABLE LAWS.....	14
6.11 PRIORITY OF DOCUMENTS	14
6.12 SACC MANUAL CLAUSES.....	14
ANNEX "A"	15
STATEMENT OF WORK	15
ANNEX "B"	21
BASIS OF PAYMENT	21
ANNEX "C"	25
SECURITY REQUIREMENTS CHECK LIST	25

ANNEX "D"	26
NON-DISCLOSURE AGREEMENT	26
ANNEX "E" TO PART 3 OF THE BID SOLICITATION	27
ELECTRONIC PAYMENT INSTRUMENTS	27
ANNEX "F"	28
TECHNICAL EVALUATION CRITERIA	28

PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1.1.1. At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

1.1.2. For additional information on security requirements, Bidders should refer to the [Contract Security Program of Public Works and Government Services Canada](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2 Statement of Work

The Work to be performed is detailed under Article 6.2 of the resulting contract clauses.

1.3 Debriefings

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

1.4 Trade Agreements

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

1.5 Canadian Content

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The [2003 \(2017-04-27\)](#) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

2.2 Submission of Bids

Bids must be submitted only to National Energy Board (NEB) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

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

Bidders who choose to submit their bids by email should note the file attachment size limit is 10MB. All emailed Bids must be received before the bid closing date and time indicated on page 1 of the bid solicitation. Any email received after the bid closing time 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, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid nonresponsive.

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;

b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

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

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

2.5 Applicable Laws

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

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

"Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted."

And

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

- Section I: Technical Bid (1 copy, or 1 electronic copy)
- Section II: Financial Bid (1 copy, or 1 electronic copy)
- Section III: Certifications (1 copy, or 1 electronic copy)
- Section IV: Additional Information (1 copy, or 1 electronic copy)

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.

Canada requests that bidders follow the format instructions described below in the preparation of hard copy of their bid:

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

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

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

Section I: Technical Bid

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

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

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

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

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

Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

See Annex F – Technical Evaluation Criteria

4.1.1.2 Point Rated Technical Criteria

See Annex F – Technical Evaluation Criteria

4.1.2 Financial Evaluation

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

The Bidder must submit its financial bid in accordance with Annex B – Basis of Payment.

The Total Extended Prices for each year will be added together to obtain the Total Evaluated Offer price.

4.2 Basis of Selection - Highest Combined Rating of Technical Merit and Price

4.2.1 To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
- b. meet all mandatory criteria; and
- c. obtain the required minimum points specified for each criterion for the technical evaluation, and
- d. obtain the required minimum of 79 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 126 points.

4.2.2. Bids not meeting (a) or (b) or (c) or (d) will be declared non-responsive.

4.2.3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.

4.2.4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.

- 4.2.5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
- 4.2.6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 4.2.7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points **equals 135** and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **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 Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid 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 Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#)" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#)" list at the time of contract award.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Canadian Content Certification

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

5.2.3.1.2 This procurement is limited to Canadian services.

The Bidder certifies that:

() the service offered is Canadian service as defined in paragraph 2 of clause A3050T

5.2.3.2 Status and Availability of Resources

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

beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

Signature: _____ Date: _____

5.2.3.3 Education and Experience

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

Signature: _____ Date: _____

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

- 6.1.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.
 - 6.1.1.1 The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid **Designated Organization Screening (DOS)** issued by the Canadian Industrial Security Directorate, Public Works and Government Services Canada.
 - 6.1.1.2 The Contractor/Offeror personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC), or other Canadian government department.
 - 6.1.1.3 The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PWGSC or the NEB has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of PROTECTED A.
 - 6.1.1.4 Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC or the NEB.
 - 6.1.1.5 The Contractor/Offeror must comply with the provisions of the:

- a. Security Requirements Check List and security guide (if applicable), attached at Annex C;
- b. Industrial Security Manual (Latest Edition).

6.2 Statement of Work

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

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

2010B (2016-04-04), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

6.3.2 Supplemental General Conditions

4008 (2008-12-12), Personal Information, apply to and form part of the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from date of Contract award for one year.

6.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Jenny Gong
Procurement Technical Analyst
National Energy Board
Suite 210, 517 Tenth Avenue SW
Calgary, AB, Canada, T2R 0A8

Telephone: 403-470-1748
Facsimile: 403-292-5503
E-mail address: jenny.gong@neb-one.gc.ca

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

6.5.2 Project Authority

The Project Authority for the Contract is: (TBD)

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority, however the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contractor's Representative

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: _____
Facsimile: _____
E-mail address: _____

6.6 Proactive Disclosure of Contracts with Former Public Servants

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

6.7 Payment

6.7.1 Basis of Payment

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work, in accordance with the Basis of payment in annex B, to a limitation of expenditure of \$_____ (insert the amount at contract award). Customs duties are included and Applicable Taxes are extra.

6.7.2 Limitation of Expenditure

6.7.2.1 Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and Applicable Taxes are extra.

6.7.2.2 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.

6.7.2.3 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.

6.7.3 Milestone Payment

SACC Manual Clause H3010C (2016-01-28), Milestone Payment – Not subject to Holdback

6.7.3.1 Schedule of Milestones

Milestone No.	Description or "Deliverable"	Percentage of Total Amount of Contract	Deliverable Date
1	Item 1 through to and including item 3 of Table 1/2 – Firm Lot Price	40%	TBD
2	Item 4 of Table 1/2 – Firm Lot Price	30%	TBD
3	Items 5 through to and including item 9 of Table 1/2 – Firm Lot Price	30%	TBD

6.7.4 Electronic Payment of Invoices – Contract

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)

6.8 Invoicing Instructions - Progress Payment Claim - Supporting Documentation not Required

6.8.1 The Contractor must submit a claim for payment using form PWGSC-TPSGC 1111, Claim for Progress Payment.

Each claim must show:

- a. all information required on form [PWGSC-TPSGC 1111](#);
- b. all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;
- c. the description and value of the milestone claimed as detailed in the Contract

6.8.2 Applicable Taxes must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.

6.8.3 The Contractor must prepare and certify one original and two (2) copies of the claim on form PWGSC-TPSGC 1111, and forward it to the Project Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.

The Project Authority will then forward the original and two (2) copies of the claim to the Contracting Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.

6.8.4 The Contractor must not submit claims until all work identified in the claim is completed.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.9.2 SACC Manual Clauses

A3060C (2008-05-12), Canadian Content Certification

6.10 Applicable Laws

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

6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4008 (2008-12-12), Personal Information;
- (c) the general conditions 2010B (2016-04-04), General Conditions – Professional Service (Medium Complexity);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) Annex D, Non-Disclosure Agreement;
- (h) the Contractor's bid dated _____, (*insert date of bid*)

6.12 SACC Manual Clauses

A7017C (2008-05-12)	Replacement of Specific Individuals
A9068C (2010-01-11)	Government Site Regulations
G1005C (2016-01-28)	Insurance – No Specific Requirement

ANNEX "A"

STATEMENT OF WORK

1. Title

Executive Search Services

2. Background

The National Energy Board (NEB) has in the past utilized the services of external service providers to provide executive search services. Utilization of this method for the identification of executive level employees has proven consistently successful in recent years. Internal staffing capacity is limited to conduct the steps necessary to achieve an accomplished, confidential and successful executive search in a timely manner.

3. Objective

The NEB requires the services of an executive search firm to assist with the confidential search for the identification of potential future executive members of the NEB. It is possible that through the search process, more than one potential candidate may be identified therefore, the NEB would like to create qualified pool of candidates for future opportunities.

4. Scope of Work:

4.1 The contractor will deliver services:

- a) Tasks/Technical Specifications for Appointment-Focused Processes;
- b) Contacts and Comprehensive Search;
- c) Advertising/Marketing;
- d) Screening, Assessment and Identification, and Short-listing of Candidates;
- e) Interviews;
- f) Reference Checks;
- g) Other Tangible and Related Services; and
- h) Additional Deliverables.
- i) Pools of candidates.

Note: In regards to below the term "Project Authority" could include: the named Project Authority and/or his/her representative and/or a selection committee.

4.2 Tasks/Technical Specifications for Appointment-Focused Processes

The Contractor must:

- 4.2.1 Develop an in-depth understanding of the requirements, qualifications, experience, knowledge and personal suitability factors that are essential or desired related to the position to be staffed, and of the relevant legislation and other related documents, and work with the Project Authority to update and finalize the selection criteria for the position;
- 4.2.2 Present to the Project Authority (PA), within two weeks of contract award, a detailed work plan which will include a list of activities and recruitment options, with specific dates that they are to be carried out and completed, the names of individuals responsible for the activities, along with details of assessment and screening tools and methodology to be used in the search and recruitment processes. As the Project Authority is subject to specific requirements under the Public Service Employment Act (PSEA), the PA will require that the Contractor utilizes the PA's prescribed formats for details of screening, assessment and methodology. If requested by the

Project Authority the detailed work plan should also include a description of methods or processes that would be used to identify members of employment equity designated groups (i.e., women, aboriginal peoples, members of visible minorities and persons with disabilities);

- 4.2.3 Provide the Project Authority with a list of target markets, regions, associations and individuals deemed suitable for consideration and to be contacted to determine interest and suitability;
- 4.2.4 Present an initial progress report to the Project Authority within two (2) to four (4) weeks (to be determined by the Project Authority) in order to confirm that the search process is developing according to expectations, the critical path and the work plan, and to discuss the appropriateness of targeted regions, companies, associations, employment equity groups and individuals;
- 4.2.5 Prepare reference material packages (Candidate or Executive Brief) packages for potential candidates (e.g., regarding the organization and position) and reference material packages or binders for Selection Committee members (e.g., regarding the organization and position and the candidates being considered) in preparation for interviews and meetings. These documents must be provided to the Project Authority, for review and approval, at least one week in advance of distribution; and
- 4.2.6 Reconfirm with the Project Authority or his/her representative thereafter, verbally or in writing on a bi-weekly or more frequent basis (as determined by the Project Authority) that the process steps are unfolding as planned and if need be, to redefine the selection process direction.

4.3 Contacts and Comprehensive Search

The Contractor must:

- 4.3.1 Research, complete and document a systematic and comprehensive search of target markets, regions, companies, associations and individuals and present findings to the Project Authority (the "search and target" process); and
- 4.3.2 The search and target process must be documented and the documentation provided to the Project Authority in a final report, and, if requested by the Project Authority, at the conclusion of the search and target process.

4.4 Advertising/Marketing

The Contractor must:

- 4.4.1 Develop for consideration and approval by the Project Authority, advertising/awareness campaigns, including ads in newspapers, bulletins, professional association journals or selected publications, relevant association websites, and electronic job advertising sites. The Contractor must ensure that Federal Official Language Act guidelines related to advertising are followed by consulting with the PA. This must be provided to the Project Authority, for review and approval, at least one week in advance of distribution; and
- 4.4.2 Undertake placement and timing of media advertising of the position in the media (if required and approved in writing by the Project Authority) including but not limited to:
 - a) Placing ads in: newspapers, bulletins, professional association journals or select publications, relevant association websites and electronic job advertising sites in English and French.

Note: The services provided in 4.4.2 are cost reimbursable.

4.5 Screening, Assessment and Identification, and Short-listing of Candidates:

The Contractor must:

- 4.5.1 Have all applications be processed through the Government of Canada Jobs site. The Contractor will identify candidates through the search and target process, including by receiving applications and referrals from the advertising/awareness campaigns or indirect and direct recruitment and outreach;
- 4.5.2 Review proposed methodology to assess candidates with the Project Authority;
- 4.5.3 Screen and conduct a preliminary assessment of these candidates against the selection criteria developed for the position;
- 4.5.4 Determine the candidates' level of interest, and make recommendations to the Project Authority for further follow-up;
- 4.5.5 Provide the Project Authority with a long-list of candidates at least one week in advance of distribution, indicating each individual's potential suitability for the position, based on the selection criteria developed for the position and the contractor's assessment;
- 4.5.6 Review long-list of potential candidates with the Project Authority, offering expert advice and counsel so that the most suitable prospective candidates for the position are considered for further assessment;
- 4.5.7 Arrange meeting and/or teleconferences with the Project Authority to review the long-list of candidates and determine the list of candidates to be invited for a written test. Material for meetings must be provided to the Project Authority at least one week in advance;
- 4.5.8 Administer the written test developed by the Project Authority to candidates selected in 4.5.7 by the Project Authority, and submit the written tests to the Project Authority for marking. Administration of the written test shall be done in the manner determined by the Project Authority;
- 4.5.9 Arrange meeting and/or teleconferences with the Project Authority to review the results of the written test and determine the short-list of candidates to be invited for interviews. Material for meetings must be provided to the Project Authority at least one week in advance; and
- 4.5.10 Work with the Project Authority to finalize a short-list of candidates for further assessment and consideration.

4.6 Interviews

The Contractor must:

- 4.6.1 Prepare, in consultation with the Project Authority, interview questions and all interview documentation including assessment reports and final reports. "Interview documentation" also includes any information provided to candidates either in advance or at the time of the interview, and includes packages or binders for selection committee members with all information relevant to the interviews, whether or not it has been provided at other times during the process (e.g., materials could include: interview schedule, information regarding the organization and position, the CVs and any pre-assessments of candidates being interviewed, the interview questions, the selection criteria and copies of published advertisements);
- 4.6.2 Arrange, in consultation with the Project Authority, meetings of the selection committee, including developing agendas and all meeting materials, making travel arrangements and accommodation arrangements, in accordance with Treasury Board (TB) policies and

established rates. "Meetings of the selection committee" include teleconferences as well as in-person meetings that may be required to support the executive search and selection process. These documents must be provided to the Project Authority, for review and approval, at least one week in advance of distribution

"Accommodation arrangements" include overnight accommodation for selection committee members as well as meeting rooms, simultaneous translation services (if required) and hospitality, as required. Location of meetings is to be approved in advance by the Project Authority. No administrative fees will be charged on either travel or accommodation; and

- 4.6.3 Arrange, in consultation with the Project Authority, formal interviews of identified candidates, including interview schedules, travel arrangements and accommodation arrangements, in accordance with Treasury Board (TB) policies and established rates. "Interviews" include interviews of candidates with the selection committee (if required) and any other meetings required with candidates, such as those needed to conduct psychometric assessments or provide oral debriefing to candidates on the psychometric assessments conducted. "Accommodation arrangements" include overnight accommodation for candidates as well as meeting rooms, simultaneous translation services (if required) and hospitality for interviews and meeting rooms for candidate preparation, as required. Location of interviews is to be approved in advance by the Project Authority. No administrative fees will be charged on either travel or accommodation.

Note: any travel or accommodation expenses incurred under 4.6.2 are cost reimbursable.

4.7 Reference Checks

For each candidate proposed for consideration for appointment by the Government, the Contractor must:

- 4.7.1 Confirm data such as education, employment dates, positions held, and reasons for leaving previous positions in accordance with Canadian standards;
- 4.7.2 Conduct, in consultation with the Project Authority, reference checks, using a methodology approved by the Project Authority;
- 4.7.3 Provide the results of the reference checks and other data checks undertaken to the Project Authority; and
- 4.7.4 Prepare and submit to the Project Authority written reports detailing the outcomes of data and reference checks, within one week of their completion.

5. Additional Deliverables

The Contractor must:

- 5.1 Provide simultaneous translation services if required, and approved in advance by the Project Authority; and
- 5.2 Provide the Project Authority with a final report of the search process, outlining the recruitment strategy, copies of media advertisements, including the publication schedules, the number of individuals contacted, the number and names of all applicants and referrals, and other information relevant to the search process, including names of candidates for which reference checks, and other assessments were conducted, a synopsis of reference checks, the name(s) of the finalist candidate(s) that the Selection Committee agreed to and copies of **all** invoices, including those related to travel, accommodation (including interview rooms) and other logistical support costs.
- 5.3 Ensure that confidentiality and privacy requirements are not breached in respect of candidates' personal information.

6. Pools of candidates

Draw up, in consultation with NEB authorities and based on the Statement of Merit Criteria, a list of names of candidates deemed suitable and qualified for similar positions.

7. Guarantee Non-Performance

If a recruited candidate does not accept the position, resigns within twelve (12) months of the effective date of the appointment to the position, or is terminated for cause within twelve (12) months of the effective date of the appointment to the position, the Contractor must provide one or more alternate candidates at no additional cost.

8. Candidates Hands-Off Policy

The Contractor must maintain a two-year "candidate hands-off" policy. This means that the Contractor cannot approach candidates appointed to the position, for other employment and opportunities for a twenty-four month period after the effective date of the appointment to the position.

9. Resources

To ensure efficient and effective services, the Contractor must provide the services of an Account Manager. The Account Manager is the individual responsible for direct communication with the Project Authority and will serve as the key point of contact throughout the Executive Search process.

The expected process is for Identified Users to make contact with the Contractor through the Account Manager, with the Account Manager then responsible for identifying the expertise within their organization (e.g., Search Specialist, Recruiting Co-ordinator etc.), to fill the requirement.

Note: The categories described above, i.e., Account Manager, Search Specialist and Recruiting Coordinator are not intended to correspond to any one contractor's definition or categorization as such definitions or categorizations may vary between contractors.

9.1 Minimum Educational/Experience Requirements

At a Minimum the Account Manager must:

- a) Be able to communicate effectively in English; and
- b) Have knowledge of recruitment methods, metrics and reporting standards.

9.2 Language of the Work

The Contractor will be required to provide services in both official languages (English and French). The Account Manager must be able to communicate effectively verbally and in writing in English.

10. Non-Disclosure Agreement

As the Contractor will have access to confidential and sensitive information the non-disclosure agreement at Annex D must be signed before access to such information is given.

11. Geographic Location of Positions

Interviews for executive searches will take place in a location(s) within Canada identified by the Project Authority. It should be noted that the majority of the meetings and interviews for executive searches for senior leadership positions will take place in Calgary, AB regardless of the geographic location of the position or the Contractor. Therefore, travel may be required for those candidates selected for interviews. Travel may also be required for staff of the Contractor for attendance at interviews or meetings in respect of the Work. Any such travel by candidates or by the Contractor's staff must be approved by the Project Authority in advance, and be supported by copies of invoices related to travel, accommodation (including interview rooms) and other logistical support costs, in accordance with article 4.5. Travel and accommodation must be in accordance with National Joint Council Travel Directive.

ANNEX "B"

BASIS OF PAYMENT

* Applicable taxes are to be excluded from the prices quoted herein *
 * Applicable taxes will be added as a separate item on the invoice, if applicable *

During the period of the Contract, for Work performed in accordance with the Annex A – Statement of Work, the Contractor will be paid as specified below.

1. Prices Tables

Table 1 – Position Salary Rates: \$114,200 – 160,800				
Item #	Statement of Work Section	Total Lot Prices Per Position (\$)		
		Contract Period From: To:	Option Year 1 From: To:	Option Year 2 From: To:
1	Tasks / Technical Specifications for Appointment - Focused Processes	\$	\$	\$
2	Contacts and Comprehensive Search	\$	\$	\$
3*	Advertising/Marketing	\$	\$	\$
4	Screening, Assessment and Identification, and Short-listing of Candidates;	\$	\$	\$
5	Interviews	\$	\$	\$
6	Reference Checks	\$	\$	\$
7*	Other Tangible and Related Services	\$	\$	\$
8*	Additional Deliverables	\$	\$	\$
9	Pools of candidates	\$	\$	\$
Sub Total (item#1 to 9)		\$ (a)	\$ (b)	\$ (c)
Total Lot Prices in CAD (A)		\$ (a + b + c)		

Table 2 – Position Salary Rates: \$142,800 – 199,600				
Item #	Statement of Work Section	Total Lot Prices Per Position (\$)		
		Contract Period From: To:	Option Year 1 From: To:	Option Year 2 From: To:
1	Tasks/ Technical Specifications for Appointment-Focused Processes	\$	\$	\$
2	Contacts and Comprehensive Search	\$	\$	\$
3*	Advertising/Marketing	\$	\$	\$
4	Screening, Assessment and Identification, and Short-listing of Candidates;	\$	\$	\$
5	Interviews	\$	\$	\$
6	Reference Checks	\$	\$	\$
7*	Other Tangible and Related Services	\$	\$	\$
8*	Additional Deliverables	\$	\$	\$
9	Pools of candidates	\$	\$	\$
Sub Total (item#1 to 9)		\$ (d)	\$ (e)	\$ (f)
Total Lot Prices in CAD (B)		\$ (d + e + f)		

* Items 3, 7 & 8 reflect amounts/percentages in respect of the Contractor's own work. These items may have additional associated reimbursable costs (see Annex B). The amounts above should not include any anticipated reimbursable costs

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

2. Cost Reimbursable Expenses

2.1 Authorized travel and living expenses for Work performed outside Calgary, AB only.

For the requirements relative to travel described in article 11 - Geographic Location of Positions, of the Statement of Work in Annex A.

The Contractor 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 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/d10>) and with the other provisions of the directive referring to "travelers", rather than those referring to "employees".

All travel must have the prior authorization of the Project Authority.

The authorized travel and living expenses will be paid upon submission of an itemized statement supported by receipt vouchers. All payments are subject to government audit.

Canada will not accept any travel and living expenses for:

- a) Any travel between the Contractor's place of business and the Calgary AB, unless approved in advance by the project authority in accordance with Article 9 of the Statement of Work; and
- b) Any relocation of resources required to satisfy the terms of the Contract. These expenses are included in the all-inclusive limitation of expenditure specified in article 1 – Limitation of Expenditure above.

2.2 Total Estimated Cost of Authorized Travel and Living Expenses (C= i+ii+iii)

- i. In Contract Period: \$ _____
- ii. In Contract Option Year 1: \$ _____
- iii. In Contract Option Year 2: \$ _____

3. Other Authorized Expenses

The Contractor will be reimbursed the other direct expenses it reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and administrative overhead. These expenses will be paid upon submission of an itemized statement supported by receipt vouchers.

All "Other Authorized Expenses" must have the prior authorization of the Project Authority.

Table 3 – Other Direct Expenses				
		Contract Period From: To:	Option Year 1 From: To:	Option Year 2 From: To:
Article 4.4 Advertising (Ad.)/ Marketing	Includes but is not limited to, placing ads in: newspapers, bulletins, professional association journals or select publications, relevant association websites and electronic job advertising sites, as approved by the Project Authority.	\$ /per Ad. online	\$ / per Ad. online	\$ /per Ad. online
Clause 4.4.2		\$ / per Ad. on Newspaper	\$ / per Ad. on Newspaper	\$ / per Ad. on Newspaper
Article 4.6 Clause 4.6.2	Includes but is not limited to, meetings of the selection committee, including developing agendas and all meeting materials, making travel arrangements and accommodation arrangements, in accordance with Treasury Board (TB) policies and established rates. "Meetings of the selection committee" include teleconferences as well as in-person meetings that may be required to support the executive search and selection process. "Bidder's Accommodation arrangements" include overnight accommodation for selection committee members as well as meeting rooms, simultaneous translation services (if required) and hospitality, as required. Location of meetings is to be approved in advance by the Project Authority. No administrative fees will be charged on either travel or accommodation.	\$	\$	\$
Article 5 Additional Deliverables Clause 5.1	Simultaneous translation services for interviews or meetings, approved by the Project Authority.	\$	\$	\$
Sub Total Estimated Cost of Other Authorized Expenses		\$ (g)	\$ (h)	\$ (i)
Total Estimated Cost of Other Authorized Expenses (D)		\$ (g+h+i)		

ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST

See PDF in 3 pages

ANNEX "D"

NON-DISCLOSURE AGREEMENT

I, _____, recognize that in the course of my work as a contractor or subcontractor of the National Energy Board, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract 84084-17-0144 between Her Majesty the Queen in right of Canada, and _____, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

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

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

I agree that the obligation of this agreement will survive the completion of the Contract:
84084-17-0144.

Signature

Date

ANNEX "E" to PART 3 OF THE BID SOLICITATION

ELECTRONIC PAYMENT INSTRUMENTS

As indicated in Part 3, clause 3.1.2, the Bidder must identify which electronic payment instruments they are willing to accept for payment of invoices.

The Bidder accepts any of the following Electronic Payment Instrument(s):

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

ANNEX "F"

TECHNICAL EVALUATION CRITERIA

1 Mandatory Technical Criteria

The Mandatory Requirements listed below will be evaluated on a simple met/not met (i.e. compliant/non-compliant) basis. Each Mandatory Requirement must be addressed separately. Proposals which fail to meet the Mandatory Requirements will be deemed non-responsive and given no further consideration.

Proposals MUST demonstrate compliance with all of the following Mandatory Requirements and MUST provide the necessary documentation to support compliance.

Item No.	Mandatory Technical Criteria (M)	Met /Not Met	Proposal Page#
M1	The Bidder must have experience in successfully completing executive searches for senior positions in the Federal Government. i.e. CEOs or equivalent, Vice Presidents or equivalent, CFO, in the energy and/or oil and gas section in the past five years from the bid closing date.		
M2	<p>The Account Manager that bidder proposed must</p> <ul style="list-style-type: none"> • Possess an undergraduate degree from a Canadian University or Canadian recognized University. The University degree must be from a recognized Canadian University, or if obtained outside of Canada, be approved by a recognized Canadian academic credentials assessment service i.e. identified at: http://www.cicic.ca/927/Identify-the-organization-responsible-for-recognition.canada and have 5 years of related work experience as an Executive Search Account Manager from the bid closing date ; <p>Or</p> <ul style="list-style-type: none"> • Have 10 years of related work experience as an Executive Search Account Manager within the past 20 from years from the bid closing date. <p>Proof documents with resume must be provided.</p>		
M3	The Bidder must demonstrate that it has the capacity to provide experienced back-up resources and support services to ensure that timeframes are not impacted by absences of the identified lead resources.		

M4	Security Requirement The bidder must meet Article 6.1 Security Requirements in PART 6 – SECURITY REQUIREMENTS. A proof document will be provided with bid. Failure to do so will result in the bid deemed non responsive.		
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2. Point Rated Technical Criteria

Bid will be evaluated and scored as specified in the tables below. Failure of obtaining the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Item No	Point-rated Requirements	Bidder Preparation Instructions	Weighting Points
R1 – Bidder’s Locations			
R1	Bidder should have a national presence in: a) British Columbia; b) Alberta; c) Calgary, AB; d) Ontario; e) Quebec; and f) Atlantic Canada.	Bidder should clearly demonstrate they have a national presence in a) British Columbia; b) Alberta; c) Calgary, AB; d) Ontario; e) Quebec; and f) Atlantic Canada	2 4 4 2 2 2
<i>Maximum Points of R1</i>			16
<i>Minimum Passing Points of R1</i>			8
R2 – Bidder’s Expertise			
R2.1	Bidder should have a good understanding of the energy and/or oil and gas industries, the National Energy Board (NEB) and its regulatory role, the aspects of the industries it regulates and its partners and stakeholder communities.	Bidder should provide the detail and description necessary to demonstrate that the bidder has a good understanding of the energy and/or oil and gas industries, the NEB’s regulatory role, the aspects of the industries it regulates and its partners and stakeholder communities	Up to a maximum of 10 points (points will be given based on the rating table below
<i>Maximum Points of R2.1</i>			10
<i>Minimum Passing Points of R2.1</i>			7

R2.2	<p>With regard to the energy and/or oil and gas industries, bidder should have:</p> <ul style="list-style-type: none"> a) A robust network of contacts; b) A database of potential candidates; and c) Other recruitment tools and resources (human and other) <p>To successfully identify qualified candidates with the necessary experience and background.</p>	<p>Bidder should clearly demonstrate that with regard to the energy and/or oil and gas industries, they have:</p> <ul style="list-style-type: none"> a) A robust network of contacts; b) A database of potential candidates; and c) Other recruitment tools and resources (human and other) <p>To successfully identify qualified candidates with the necessary experience and background.</p>	<p>Up to a maximum of 10 points (points will be given based on the rating table below)</p>
		<i>Maximum Points of R2.2</i>	20
		<i>Minimum Passing Points of R2.2</i>	14
R3 – Bidder’s Experience			
R3	<p>Bidder should demonstrate that they have experience in successfully completing executive searches for senior positions (i.e. CEO’s or equivalent; Vice-Presidents or equivalent; CFO) in energy and/or oil and gas sector in the past five (5) years from the bid closing date successfully delivering requirements detailed in Annex A - Statement of Work.</p>	<p>Bidder should clearly demonstrate that they have successfully completed executive searches for senior positions in the energy and/or oil and gas sectors in the past five (5) years from the bid closing date by submitting 2-4 successfully completed searches.</p> <p>A) Bidder should clearly demonstrate that they have successfully completed executive searches for senior positions in the energy and/or oil and gas sectors in the past five (5) years from the bid closing date to successfully deliver the requirements detailed in Annex “A”</p> <p>b) the Bidder’s average time to complete successful executive search requests ;</p>	<p>Up to a maximum of 10 points (points will be given based on the rating table below)</p> <p>Up to a maximum of 10 points. (points will be given based on</p>

		<p>c) the Bidder's areas of expertise and types of executive searches performed;</p>	<p>the rating table below</p> <p>Up to a maximum of 10 points. (points will be given based on the rating table below</p>
		<p>d) what makes the Bidder's organization stand out from their competitors.</p>	<p>Up to a maximum of 20 points. (points will be given based on the rating table below</p>
		<i>Maximum Points of R3</i>	<i>50</i>
		<i>Minimum Passing Points of R3</i>	<i>30</i>
R4 – Bidder's Project Plan			
R4	<p>Bidder should provide a project plan showing rigorous project management methodology and using generally accepted project management tools and techniques, i.e. initiation, planning, execution, monitoring and controlling, and closing and use of automated project management tools such as MS Project to manage project scope, quality, time and cost etc.</p>	<p>The following areas will be taken into consideration:</p> <ul style="list-style-type: none"> • Comprehensiveness, clarity of the project plan, schedule, level of effort, and relevance. 	<p>Up to a maximum of 30 points. (points will be given based on the rating table below</p>
		<i>Maximum Points R4</i>	<i>30</i>
		<i>Minimum Passing Points of R4</i>	<i>20</i>
Total Scores (R1 to R4)			126
Minimum Total Passing Scores (R1 to R4)			79

Rating Table	
Percentage of Available Points	Basis for Percentage Distribution
0%-49%	The response is deficient. Supplier receives 0%- 49 % of the available points for this element.
50%-69%	The response includes some information, but is also missing a substantial amount of information. Supplier receives 50% -69% of the available points for this element.
70%-84%	The response includes most of the information required to be complete. Supplier receives 70% - 84% of the available points for this element.
85%-99%	The response includes a substantive amount of the information required to be complete. Supplier receives 85%-99% of the available points for this element.
100%	The response is complete. Supplier receives 100% of the available points for this element.
<p>This Rating Table applies to all Point Rated Technical Criteria (R1, R2, R3 and R4)</p>	



Contract Number / Numéro du contrat 17-0144
Security Classification / Classification de sécurité

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine National Energy Board	2. Branch or Directorate / Direction générale ou Direction People and Knowledge, HR Services
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3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
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4. Brief Description of Work / Brève description du travail
 To provide Executive Search Services to assist the Executive Vice President with the staffing of the Professional Leader, Economic, including identifying a list of suitable candidates for consideration for this position. In addition, this contract will be for an initial year, and will be available for extension for two additional year extensions., for possible future executive staffing.
 There is a requirement for the contractor to work closely with the Project Authority or their representative in order to meet the legal requirements for staffing under the PSEA.

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? No / Non Yes / Oui

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? No / Non Yes / Oui

6. Indicate the type of access required / Indiquer le type d'accès requis

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) No / Non Yes / Oui

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. No / Non Yes / Oui

6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? No / Non Yes / Oui

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
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7. b) Release restrictions / Restrictions relatives à la diffusion

No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/> <i>du</i>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ZM No Yes

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No Yes

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET- SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMPLACEMENTS | | | |

Special comments:

Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work? ZM No Yes

Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté?

No Yes
 Non Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises? ZM No Yes

Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

11. b) Will the supplier be required to safeguard COMSEC information or assets? No Yes

Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

No Yes
 Non Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises? No Yes

Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

No Yes
 Non Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data? ZM No Yes

Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

No Yes
 Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency? No Yes

Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

No Yes
 Non Oui



Contract Number / Numéro du contrat
Security Classification / Classification de sécurité

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET
							NATO DIFFUSION RESTREINTE	NATO CONFIDENTIEL	A		B	C				
Information / Assets Renseignements / Biens Production	✓															
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).