



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

Bid Receiving /

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Canada School of Public Service/
École de la fonction publique du Canada
Bid Receiving Unit (Mailroom) /
Réception des soumissions (salle de courrier)
De La Salle Campus / Campus de La Salle
373 Sussex Drive
Ottawa, Ontario (Canada) K1N 6Z2

**REQUEST FOR PROPOSAL
DEMANDE DE SOUMISSION**

Proposal to: Canada School of Public Service

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 à : École de la fonction publique du 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 - Commentaries

THIS DOCUMENT CONTAINS NO SECURITY REQUIREMENT / CE DOCUMENT NE CONTIENT AUCUNE EXIGENCE RELATIVE À LA SÉCURITÉ

Title-Sujet Canadian Regional and Local Subject Matter Expert and Study Tour Coordinator for the School's Executive Leadership Development Program	
Solicitation No. – No. de l'invitation CSPS-RFP-17NL-1631	Date 08/03/2018
Client Reference No. - No. De Référence du Client 2017-1631	
Solicitation Closes - L'invitation prend fin on - le 19/04/2018 at - à 02:00 PM / 14h00	Time Zone Fuseau horaire Eastern Daylight Time Heure avancée de l'est
Address inquiries to: - Adresser toute demande de renseignements à : Nathalie Lafortune	
Email Address: - Adresse courriel : Nathalie.lafortune@canada.ca	
Telephone No. - No de téléphone 819-994-9890	Fax No. – No de Fax:
Destination of Goods and Services: Destinations des biens et services: See Herein Voir aux présentes	
Instructions : See Herein Instructions : Voir aux présentes	
Delivery Required – Livraison exigée See Herein - Voir aux présentes	Delivery Offered – Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur Telephone No. – No de téléphone Facsimile No. – No 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 Signature _____ Date _____	

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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, Security Requirements, the Security Requirements Checklist, the Electronic Payment Instruments, the Task Authorizations Form and any other annexes.

1.2 Summary

- 1.2.1** The Canadian School of the Public Service (CSPS or the School) has a requirement for a subject matter expert on various Canadian local and regional issues and well networked across the public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations, in the following regions: 1) British Columbia; 2) Prairies; 3) Ontario & Quebec; and 4) Atlantic provinces.

The Contractor is expected to have a diverse network of contacts within the government, private, academic, non-government sectors and local community groups. The Contractor must, on an "as and when required basis", be able to secure meetings with leaders, arrange site visits to fulfil the program requirements and objectives.

The School intends to award up to four (4) contracts (one contract for each region). Each Contract is for a period of one (1) year from time of Contract award with the irrevocable option to extend the Contract by up to three (3) additional one-year period under the same terms and conditions. **Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.**

1.2.2 Security Requirements

There are no security requirements associated with this requirement.

1.2.3 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

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

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

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

- a) Wherever Public Works and Government Services Canada (PWGSC) revise to read "Canada School of Public Service (the School)".
- b) At Article 05, Submission of Bids, subparagraph 4, delete "Bids will remain open for acceptance for a period of not less than sixty (60) days from the closing date of the bid solicitation. Insert "Bids will remain open for acceptance for a period of not less than 120 days from the closing date of the bid solicitation."
- c) At Article 08, Transmission by Facsimile is deleted in its entirety.
- d) At Article 20, Further Information, delete the second paragraph in its entirety.

2.2 Submission of Bids

Bids must be submitted to the Canada School of Public Service (the School) Bid Receiving Unit (Mailroom) 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 or electronic mail will not be accepted.

The Bidder should indicate the RFP number (#CSPS-RFP-17NL-1631) on all envelopes containing their bid.

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 FPS, Bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

If the Contracting Authority has not received the answer to the question and, as applicable, the information required by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the answer and, as applicable, the information required. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

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

- a) name of former public servant; and
- 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; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction 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 five (5) 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 Ontario.

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

2.6 Volumetric Data

The volumetric data provided in Attachment 1 to Part 3 – Pricing Schedule (estimated number of days) has been provided to Bidders to assist them in preparing their bids. The inclusion of this data in this bid solicitation does not represent a commitment by Canada that Canada's future usage of the service identified in this bid solicitation will be consistent with this data. It is provided purely for information purposes.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

- Section I: Technical Bid (4 hard copies);
- Section II: Financial Bid (1 hard copy);
- Section III: Certifications (1 hard copy);
- Section IV: Additional Information (1 hard copy)

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

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

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

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

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

Section I: Technical Bid

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

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

Each region will be evaluated separately. Bidders must submit their technical bid in accordance with the detailed Evaluation Criteria in Attachment 1 to Part 4, for one or more multiple regions: 1) British Columbia; 2) Prairies; 3) Ontario & Quebec; and 4) Atlantic provinces. Bidders must clearly indicate on their bid which region(s) they are bidding on. **Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s).**

Part 4, Evaluation Procedures and Attachment 1 to Part 4, Evaluation Criteria, contain additional instructions that Bidders should consider when preparing their technical bid.

Section II: Financial Bid

Bidders must submit their financial bid in Canadian funds and in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3, for one or more of the following regions: 1) British Columbia; 2) Prairies; 3) Ontario & Quebec; and 4) Atlantic provinces. The total amount of Applicable Taxes must be shown separately.

Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid which region(s) they are bidding on.

Bidders must submit their rate FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.

When preparing their financial bid, Bidders should review the Basis of Payment in Annex B and clause 4.1.2, Financial Evaluation, of Part 4.

Section III: Certifications

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

Section IV: Additional Information

In Section IV of their bid, Bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone number and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 6.1, Security Requirement, of the bid solicitation: for each individual who will require access to classified or protected information, assets or sensitive work sites:
 - a) the name of the individual;
 - b) the date of birth of the individual; and
 - c) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;

**ATTACHMENT 1 TO PART 3
 PRICING SCHEDULE**

FOR THE FOLLOWING REGION OF DELIVERY: 1) BRITISH COLUMBIA

The Bidder should complete this Pricing Schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below, its quoted firm all-inclusive daily rate (in Cdn \$) for the resource category identified.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

The rates specified below, when quoted by the Bidder, are to be firm all-inclusive daily rates for each day of work, and must also include all pre and post study tours and meetings as identified in Annex A – Statement of Work.

In addition, the rates specified below, when quoted by the Bidder, include the total estimated cost of all travel and living expenses that may need to be incurred for:

- a. work described in Part 7, Resulting Contract Clauses, of this bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. The *National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/en/N-4/>;
- b. any travel between the Contractor's place of business and the NCR; and
- c. the relocation of resources to satisfy the terms of any resulting contract.

These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
1	Contract Period (From date of award _____ to _____) (for a period of one year) [insert date at contract award]			
1a	Study Tour Coordinator		45 days	
Total - Contract Period:				
2	Option 1 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) [insert date at contract award]			
2a	Study Tour Coordinator		45 days	
Total - Option 1:				

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
3	Option 2 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
3a	Study Tour Coordinator		45 days	
Total - Option 2:				
4	Option 3 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
4a	Study Tour Coordinator		45 days	
Total - Option 3:				
5	TOTAL EVALUATED PRICE (applicable tax(s) excluded): (i.e., sum of: Total Contract Period + Total Option 1+ Total Option 2 + Total Option 3)			
6	Applicable Taxes Insert Tax amount(s), as applicable:			

**ATTACHMENT 1 TO PART 3
 PRICING SCHEDULE**

FOR THE FOLLOWING REGION OF DELIVERY: 2) PRAIRIES

The Bidder should complete this Pricing Schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below, its quoted firm all-inclusive daily rate (in Cdn \$) for the resource category identified.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

The rates specified below, when quoted by the Bidder, are to be firm all-inclusive daily rates for each day of work, and must also include all pre and post study tours and meetings as identified in Annex A – Statement of Work.

In addition, the rates specified below, when quoted by the Bidder, include the total estimated cost of all travel and living expenses that may need to be incurred for:

- d. work described in Part 7, Resulting Contract Clauses, of this bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. The *National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/en/N-4/>;
- e. any travel between the Contractor's place of business and the NCR; and
- f. the relocation of resources to satisfy the terms of any resulting contract.

These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
1	Contract Period (From date of award _____ to _____) (for a period of one year) [insert date at contract award]			
1a	Study Tour Coordinator		45 days	
Total - Contract Period:				
2	Option 1 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) [insert date at contract award]			
2a	Study Tour Coordinator		45 days	
Total - Option 1:				

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
3	Option 2 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
3a	Study Tour Coordinator		45 days	
Total - Option 2:				
4	Option 3 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
4a	Study Tour Coordinator		45 days	
Total - Option 3:				
5	TOTAL EVALUATED PRICE (applicable tax(s) excluded): (i.e., sum of: Total Contract Period + Total Option 1+ Total Option 2 + Total Option 3)			
6	Applicable Taxes Insert Tax amount(s), as applicable:			

**ATTACHMENT 1 TO PART 3
 PRICING SCHEDULE**

FOR THE FOLLOWING REGION OF DELIVERY: 3) ONTARIO & QUEBEC

The Bidder should complete this Pricing Schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below, its quoted firm all-inclusive daily rate (in Cdn \$) for the resource category identified.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

The rates specified below, when quoted by the Bidder, are to be firm all-inclusive daily rates for each day of work, and must also include all pre and post study tours and meetings as identified in Annex A – Statement of Work.

In addition, the rates specified below, when quoted by the Bidder, include the total estimated cost of all travel and living expenses that may need to be incurred for:

- g. work described in Part 7, Resulting Contract Clauses, of this bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. The *National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/en/N-4/>;
- h. any travel between the Contractor's place of business and the NCR; and
- i. the relocation of resources to satisfy the terms of any resulting contract.

These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
1	Contract Period (From date of award _____ to _____) (for a period of one year) [insert date at contract award]			
1a	Study Tour Coordinator		45 days	
Total - Contract Period:				
2	Option 1 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) [insert date at contract award]			
2a	Study Tour Coordinator		45 days	
Total - Option 1:				

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
3	Option 2 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
3a	Study Tour Coordinator		45 days	
Total - Option 2:				
4	Option 3 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
4a	Study Tour Coordinator		45 days	
Total - Option 3:				
5	TOTAL EVALUATED PRICE (applicable tax(s) excluded): (i.e., sum of: Total Contract Period + Total Option 1+ Total Option 2 + Total Option 3)			
6	Applicable Taxes Insert Tax amount(s), as applicable:			

**ATTACHMENT 1 TO PART 3
 PRICING SCHEDULE**

FOR THE FOLLOWING REGION OF DELIVERY: 4) ATLANTIC PROVINCES

The Bidder should complete this Pricing Schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below, its quoted firm all-inclusive daily rate (in Cdn \$) for the resource category identified.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

The rates specified below, when quoted by the Bidder, are to be firm all-inclusive daily rates for each day of work, and must also include all pre and post study tours and meetings as identified in Annex A – Statement of Work.

In addition, the rates specified below, when quoted by the Bidder, include the total estimated cost of all travel and living expenses that may need to be incurred for:

- j. work described in Part 7, Resulting Contract Clauses, of this bid solicitation required to be performed within the National Capital Region (NCR). The NCR is defined in the *National Capital Act*, R.S.C. 1985, c. N-4, S.2. The *National Capital Act* is available on the Justice Website: <http://laws.justice.gc.ca/en/N-4/>;
- k. any travel between the Contractor's place of business and the NCR; and
- l. the relocation of resources to satisfy the terms of any resulting contract.

These expenses cannot be charged directly and separately from the professional fees to any contract that may result from the bid solicitation.

The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
1	Contract Period (From date of award _____ to _____) (for a period of one year) [insert date at contract award]			
1a	Study Tour Coordinator		45 days	
Total - Contract Period:				
2	Option 1 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) [insert date at contract award]			
2a	Study Tour Coordinator		45 days	
Total - Option 1:				

	PERIOD	FIRM ALL-INCLUSIVE DAILY RATE (in CDN \$)	VOLUMETRIC DATA (Estimated Number of Days)	TOTAL (in CDN \$)
		A	B	C = A x B
3	Option 2 to Extend Contract Term (From _____ to _____) (for an additional one year (1) period) <i>[insert date at contract award]</i>			
3a	Study Tour Coordinator		45 days	
Total - Option 2:				
4	Option 3 to Extend Contract Term (From _____ to _____) (for an additional one (1) year period) <i>[insert date at contract award]</i>			
4a	Study Tour Coordinator		45 days	
Total - Option 3:				
5	TOTAL EVALUATED PRICE (applicable tax(s) excluded): (i.e., sum of: Total Contract Period + Total Option 1+ Total Option 2 + Total Option 3)			
6	Applicable Taxes			
Insert Tax amount(s), as applicable:				

N° de l'invitation - Solicitation No.
CSPS-RFP-17NL-1610
N° de réf. du client - Client Ref. No.
2017-1610

N° de la modif - Amd. No.
File No. - N° du dossier
CSPS-RFP-17NL-1610

Id de l'acheteur - Buyer ID
E16
N° CCC / CCC No./ N° VME - FMS
0520-C10-1HBOB-54819-C43228

**ATTACHMENT 2 TO PART 3
ELECTRONIC PAYMENT INSTRUMENTS**

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

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

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 evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) Listing experience without providing any supporting data to describe where and how such experience was obtained will result in the experience not being included for evaluation purposes.
- (d) Each region will be evaluated separately. Bidders must clearly indicate which region(s) they are bidding on. Bidders can choose to submit a proposal for only one (1) region or for multiple regions(s).

4.1.1 Technical Evaluation

4.1.1.1. Mandatory Technical Criteria

Refer to Attachment 1 to Part 4.

4.1.1.2 Technical Evaluation

Refer to Attachment 1 to Part 4.

4.1.2 Financial Evaluation

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

The volumetric data included in the Pricing Schedule detailed in Attachment 1 to Part 3 are provided for bid evaluation price determination only. They are not to be considered as a contract guarantee.

For bid evaluation and contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3. It is intended to award up to four (4) individual contracts, one contract per region. Bidders may bid on one or more regions. The responsive bid with the lowest evaluated price for each region will be recommended for award of a contract.

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit (60%) and Price (40%)

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 21 points overall for the technical evaluation criteria which is subject to point rating. The rating is performed on a scale of 30 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.

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. 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 %.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
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 equal 135 and the lowest evaluated price is \$45,000 (45).

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

		Bidder 1	Bidder 2	Bidder3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000	\$50,000	\$45,000
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		1 st	3 rd	2 nd

**ATTACHEMENT 1 TO PART 4
 EVALUATION CRITERIA**

FOR THE FOLLOWING REGION OF DELIVERY: 1) BRITISH COLUMBIA

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Mandatory Technical Criteria (MT)		
Number	Mandatory Technical Criterion	Cross Reference to Bidder's Proposal
MT1	<p>The Bidder must demonstrate that the proposed resource has a minimum of three (3) years' experience within the last ten (10) years at the time of the Bid solicitation closing date, working as a regional subject matter expert on socio-economic issues that are pertinent to the region of delivery and with various stakeholders.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each project (maximum of 8 projects can be presented):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work; 3. The start and end dates (month/year to month/year for each project); and 4. The Bidder's role and responsibilities. <p>Each period must be distinct, meaning that a twelve (12) month period cannot overlap any other twelve (12) month period. Any months of experience stated whose timeframe overlaps that of another time frame will be only be counted once.</p> <p>Client reference may be contacted to validate the experience and information provided.</p>	

MT2	<p>The Bidder must demonstrate that the proposed resource has designed and coordinated a minimum of three (3) multi-day events within the last eight (8) years at the time the Bid solicitation closing date, related to topics that are relevant and of importance to the proposed region of delivery.</p> <p>The multi-day events must involve various multi stakeholders or subject matter experts within a city or within more than one city and where travel might be required.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each multi-day event:</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the multi-day event; 3. The start and end dates (day/month/year format to day/month/year for each multi-day event); and 4. The Bidder's role and responsibilities. <p>Client reference may be contacted to validate the experience and information provided.</p>	
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Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Point Rated Technical Criteria (RT)			
Number	Point Rated Technical Criterion	Scoring Criteria	Maximum Points
RT1	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events <u>for small groups of executives</u>.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Group of executives is defined as: public service executives EX 04 and EX 05 levels (e.g. Senior Vice President equivalent who report to CEO or President).</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5</p>	15

	<p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p>events: 10 points</p> <p>More than 6 events: 15 points</p>	
RT2	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events involving various multi-stakeholders <u>for small groups of executives</u>, in the following region: 1) British Columbia.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Multi-stakeholders is defined as: public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations.</p> <p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six (6)):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5 events: 10 points</p> <p>More than 6 events: 15 points</p>	15
Total of all the Point Rated Technical Criteria:			30
Overall Minimum required score to obtain is: 21 or 70%			

**ATTACHEMENT 1 TO PART 4
EVALUATION CRITERIA**

FOR THE FOLLOWING REGION OF DELIVERY: 2) PRAIRIES

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

MT1	<p>The Bidder must demonstrate that the proposed resource has a minimum of three (3) years' experience within the last ten (10) years at the time of the Bid solicitation closing date, working as a regional subject matter expert on socio-economic issues that are pertinent to the region of delivery and with various stakeholders.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each project (maximum of 8 projects can be presented):</p> <ol style="list-style-type: none">1. The client organization's legal name, Client Contact name; Client contact email address and telephone number;2. A description of the Work;3. The start and end dates (month/year to month/year for each project); and4. The Bidder's role and responsibilities. <p>Each period must be distinct, meaning that a twelve (12) month period cannot overlap any other twelve (12) month period. Any months of experience stated whose timeframe overlaps that of another time frame will be only be counted once.</p> <p>Client reference may be contacted to validate the experience and information provided.</p>	
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MT2	<p>The Bidder must demonstrate that the proposed resource has designed and coordinated a minimum of three (3) multi-day events within the last eight (8) years at the time the Bid solicitation closing date, related to topics that are relevant and of importance to the proposed region of delivery.</p> <p>The multi-day events must involve various multi stakeholders or subject matter experts within a city or within more than one city and where travel might be required.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each multi-day event:</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the multi-day event; 3. The start and end dates (day/month/year format to day/month/year for each multi-day event); and 4. The Bidder's role and responsibilities. <p>Client reference may be contacted to validate the experience and information provided.</p>	
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Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Point Rated Technical Criteria (RT)			
Number	Point Rated Technical Criterion	Scoring Criteria	Maximum Points
RT1	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events <u>for small groups of executives</u>.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Group of executives is defined as: public service executives EX 04 and EX 05 levels (e.g. Senior Vice President equivalent who report to CEO or President).</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5</p>	15

	<p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p>events: 10 points</p> <p>More than 6 events: 15 points</p>	
RT2	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events involving various multi-stakeholders <u>for small groups of executives</u>, in the following region: 2) Prairies.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Multi-stakeholders is defined as: public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations.</p> <p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six (6)):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5 events: 10 points</p> <p>More than 6 events: 15 points</p>	15
Total of all the Point Rated Technical Criteria:			30
Overall Minimum required score to obtain is: 21 or 70%			

**ATTACHEMENT 1 TO PART 4
EVALUATION CRITERIA**

FOR THE FOLLOWING REGION OF DELIVERY: 3) ONTARIO & QUEBEC

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

MT1	<p>The Bidder must demonstrate that the proposed resource has a minimum of three (3) years' experience within the last ten (10) years at the time of the Bid solicitation closing date, working as a regional subject matter expert on socio-economic issues that are pertinent to the region of delivery and with various stakeholders.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each project (maximum of 8 projects can be presented):</p> <ol style="list-style-type: none">1. The client organization's legal name, Client Contact name; Client contact email address and telephone number;2. A description of the Work;3. The start and end dates (month/year to month/year for each project); and4. The Bidder's role and responsibilities. <p>Each period must be distinct, meaning that a twelve (12) month period cannot overlap any other twelve (12) month period. Any months of experience stated whose timeframe overlaps that of another time frame will be only be counted once.</p> <p>Client reference may be contacted to validate the experience and information provided.</p>	
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MT2	<p>The Bidder must demonstrate that the proposed resource has designed and coordinated a minimum of three (3) multi-day events within the last eight (8) years at the time the Bid solicitation closing date, related to topics that are relevant and of importance to the proposed region of delivery.</p> <p>The multi-day events must involve various multi stakeholders or subject matter experts within a city or within more than one city and where travel might be required.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each multi-day event:</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the multi-day event; 3. The start and end dates (day/month/year format to day/month/year for each multi-day event); and 4. The Bidder's role and responsibilities. <p>Client reference may be contacted to validate the experience and information provided.</p>	
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Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Point Rated Technical Criteria (RT)			
Number	Point Rated Technical Criterion	Scoring Criteria	Maximum Points
RT1	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events <u>for small groups of executives</u>.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Group of executives is defined as: public service executives EX 04 and EX 05 levels (e.g. Senior Vice President equivalent who report to CEO or President).</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5</p>	15

	<p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p>events: 10 points</p> <p>More than 6 events: 15 points</p>	
RT2	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events involving various multi-stakeholders <u>for small groups of executives</u>, in the following region: 3) Ontario and Quebec.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Multi-stakeholders is defined as: public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations.</p> <p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six (6)):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5 events: 10 points</p> <p>More than 6 events: 15 points</p>	15
Total of all the Point Rated Technical Criteria:			30
Overall Minimum required score to obtain is: 21 or 70%			

**ATTACHEMENT 1 TO PART 4
EVALUATION CRITERIA**

FOR THE FOLLOWING REGION OF DELIVERY: 4) ATLANTIC PROVINCES

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Each region will be evaluated separately. Bidders can choose to submit a bid for only one (1) region or for multiple regions(s), but should submit a separate bid for each specified region(s). Bidders must clearly indicate on their bid the region(s) for which they are bidding on.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

MT1	<p>The Bidder must demonstrate that the proposed resource has a minimum of three (3) years' experience within the last ten (10) years at the time of the Bid solicitation closing date, working as a regional subject matter expert on socio-economic issues that are pertinent to the region of delivery and with various stakeholders.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each project (maximum of 8 projects can be presented):</p> <ol style="list-style-type: none">1. The client organization's legal name, Client Contact name; Client contact email address and telephone number;2. A description of the Work;3. The start and end dates (month/year to month/year for each project); and4. The Bidder's role and responsibilities. <p>Each period must be distinct, meaning that a twelve (12) month period cannot overlap any other twelve (12) month period. Any months of experience stated whose timeframe overlaps that of another time frame will be only be counted once.</p> <p>Client reference may be contacted to validate the experience and information provided.</p>	
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MT2	<p>The Bidder must demonstrate that the proposed resource has designed and coordinated a minimum of three (3) multi-day events within the last eight (8) years at the time the Bid solicitation closing date, related to topics that are relevant and of importance to the proposed region of delivery.</p> <p>The multi-day events must involve various multi stakeholders or subject matter experts within a city or within more than one city and where travel might be required.</p> <p>To demonstrate this criteria the Bidder must provide the following information for each multi-day event:</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the multi-day event; 3. The start and end dates (day/month/year format to day/month/year for each multi-day event); and 4. The Bidder's role and responsibilities. <p>Client reference may be contacted to validate the experience and information provided.</p>	
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Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Point Rated Technical Criteria (RT)			
Number	Point Rated Technical Criterion	Scoring Criteria	Maximum Points
RT1	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events <u>for small groups of executives</u>.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Group of executives is defined as: public service executives EX 04 and EX 05 levels (e.g. Senior Vice President equivalent who report to CEO or President).</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5</p>	15

	<p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p>events: 10 points</p> <p>More than 6 events: 15 points</p>	
RT2	<p>The Bidder should demonstrate that the proposed resource has experience, at the time of the Bid solicitation closing date, coordinating and/or leading at least two (2) multi-day events involving various multi-stakeholders <u>for small groups of executives</u>, in the following region: 4) Atlantic Provinces.</p> <p>A small group is defined as: between 5 and 12 participants.</p> <p>Multi-stakeholders is defined as: public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations.</p> <p>In order to demonstrate this criteria the Bidder should provide the following information for each multi-day event (maximum of six (6)):</p> <ol style="list-style-type: none"> 1. The client organization's legal name, Client Contact name; Client contact email address and telephone number; 2. A description of the Work and title of the event; 3. The start and end dates (month/year to month/year of each project); 4. The Bidder's role and responsibilities; and 5. The Management level of participants (e.g. Director, VP; etc.) <p>Client reference may be contacted to validate the experience and information provided.</p>	<p><i>Points will be allocated as follows:</i></p> <p>2 - 3 events: 5 points</p> <p>4 - 5 events: 10 points</p> <p>More than 6 events: 15 points</p>	15
Total of all the Point Rated Technical Criteria:			30
Overall Minimum required score to obtain is: 21 or 70%			

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 Integrity 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 specified will render the bid non-responsive.

5.2.1 Integrity Provisions – List of Names for Integrity Verification Form

Section 17 of the [Ineligibility and Suspension Policy](#) requires suppliers, regardless of their status under the policy, to submit a list of names with their bid or offer. The list differs depending on the bidder or offeror's organizational structure: (see 5.3 *List of Names for Integrity Verification Form* at Attachment 1 to Part 5).

- Bidders including those bidding as joint ventures, whether incorporated or not, must provide a complete list of the names of all current directors;
- Privately owned corporations must provide a list of the owners' names;
- Bidders bidding as sole proprietorship, including sole proprietors bidding as joint ventures, must provide the name of the owner(s).

Bidders bidding as partnerships do not need to provide lists of names.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

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

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

5.2.3.2 Education and Experience

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

5.2.3.2.1 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.

**Attachment 1 to Part 5
 Certifications Precedent to Contract Award**

5.3 List of Names for Integrity Verification Form

Complete the on-screen form: [List of names for integrity verification form](http://www.tpsgc-pwgsc.gc.ca/ci-if/ln-form-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/ln-form-eng.html>)

Or complete the PDF form below:

Supplier Information / Renseignements sur le fournisseur	
* Supplier's Legal Name (required) / * Dénomination sociale du fournisseur (obligatoire)	
* Supplier's Address (required) / * Adresse du fournisseur (obligatoire)	
Supplier's Procurement Business No. (PBN) (optional) / N° d'entreprise-appvisionnement (NEA) du fournisseur (optionnel)	
* Solicitation No. (required) / * N° de l'invitation à soumissionner (obligatoire)	
* Date of Bid, or Closing Date of Invitation to Offer (yyyy/mm/dd) (required) / * Date de la soumission, ou de la date de clôture de l'invitation à soumissionner (aaaa/mm/jj) (obligatoire)	
List of Names / Liste de noms	
* Name 1 (required) / * Nom 1 (obligatoire)	* Title 1 (required) / * Titre 1 (obligatoire)
* Name 2 (required) / * Nom 2 (obligatoire)	* Title 2 (required) / * Titre 2 (obligatoire)
* Name 3 (required) / * Nom 3 (obligatoire)	* Title 3 (required) / * Titre 3 (obligatoire)
* Name 4 (required) / * Nom 4 (obligatoire)	* Title 4 (required) / * Titre 4 (obligatoire)
* Name 5 (required) / * Nom 5 (obligatoire)	* Title 5 (required) / * Titre 5 (obligatoire)
* Name 6 (required) / * Nom 6 (obligatoire)	* Title 6 (required) / * Titre 6 (obligatoire)
* Name 7 (required) / * Nom 7 (obligatoire)	* Title 7 (required) / * Titre 7 (obligatoire)
Declaration / Déclaration	
* I, (name) (required) / Je, * (nom) (obligatoire) :	
* (position) (required) / * (poste) (obligatoire) :	
* of (supplier's name) (required) / * à (nom de la société de l'entrepreneur) (obligatoire) :	
<p>declare that the information provided in this form is, to the best of my knowledge and belief, true, accurate and complete. I am aware that failing to provide the list of names will render a bid or offer non-responsive, or I will be otherwise disqualified for award of a contract or real property agreement. I am aware that during the bid or offer evaluation stage, I must, within 10 working days, inform the contracting authority in writing of any changes affecting the list of names submitted. I am also aware that after contract award I must inform the Registrar of Ineligibility and Suspension within 10 working days of any changes to the list of names submitted. /</p> <p>déclare que les renseignements inscrits dans ce formulaire sont, au meilleur de mes connaissances, véridiques, exactes et complètes. Je suis conscient que le défaut de fournir la liste des noms dans le délai prescrit rendra ma soumission ou mon offre irrecevable, ou autrement entraînera mon exclusion du processus d'attribution de l'accord immobilier ou du contrat. Je suis conscient que pendant l'évaluation des soumissions ou des offres, je dois, dans les 10 jours ouvrables, informer par écrit l'autorité contractante de toute modification de la liste des noms. Je suis également conscient qu'après l'attribution du contrat, je dois informer le Registraire d'inadmissibilité et de suspension dans les 10 jours ouvrables suivant tout changement à la liste de noms présentée.</p>	
Signature / signature	Date (yyyy/mm/dd) / date (aaaa/mm/jj)

N° de l'invitation - Solicitation No.
CSPS-RFP-17NL-1610
N° de réf. du client - Client Ref. No.
2017-1610

N° de la modif - Amd. No.
File No. - N° du dossier
CSPS-RFP-17NL-1610

Id de l'acheteur - Buyer ID
E16
N° CCC / CCC No./ N° VME - FMS
0520-C10-1HBOB-54819-C43228

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

There are no security requirements associated with this requirement.

PART 7 - RESULTING CONTRACT CLAUSES

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

Delivery Requirements Outside a Comprehensive Land Claims Settlement Area

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

7.1 Statement of Work

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

7.1.1 Optional Services

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at Annex "A" of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option(s) may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.1.2 Task Authorization

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

7.1.2.1 Task Authorization Process:

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

7.1.2.2 Task Authorization Authorities

Any task authorization to be issued must be authorized by both the Project Authority and the Contracting Authority before issuance.

Any TA that does not bear the appropriate signature(s) is not validly issued by Canada. Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TAs at any time, or reduce the dollar value threshold described in sub-article (A) above; any suspension or reduction notice is effective upon receipt.

7.1.2.3 Minimum Work Guarantee - All the Work - Task Authorizations

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

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

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

- Wherever Public Works and Government Services Canada (PWGSC) revise to read "Canada School of Public Service (the School)" with the exception of article 41 Integrity Provisions – Contract where any reference to PWGSC remains.

7.2.2 Supplemental General Conditions

2010B (2016-04-04), General Conditions – Professional Services (Medium Complexity) apply to and form part of the Contract with the following changes:

- Wherever Public Works and Government Services Canada (PWGSC) revise to read "Canada School of Public Service (the School)".

7.3 Security Requirements

7.3.1 There is no security requirement applicable to the Contract.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract award to _____ (for a period of one year from date of Contract award). *[insert date at contract award]*

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year period(s) 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 thirty (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.

7.4.3 Termination on Thirty Days Notice

1. Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.
2. In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

7.4.4 Delivery Points

Delivery of the requirement will be made to delivery point(s) specified at Annex A of the Contract.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Nathalie Lafortune
Title: Senior Procurement Specialist
Organization: Senior Procurement Specialist, Corporate Services Branch, Procurement and Contracting Unit, Canada School of Public Service
Telephone: 819-994-9890
E-mail address: Nathalie.lafortune@canada.ca

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

7.5.2 Project Authority *[insert information at contract award]*

The Project Authority for the Contract is:

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

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

7.5.3 Contractor's Representative *[insert information at contract award]*

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

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Payment

7.7.1 Basis of Payment – Individual Task Authorizations

The Contractor will be paid for the Work specified in the authorized task authorization, in accordance with the Basis of payment detailed below.

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

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

Professional Fees

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid a firm all-inclusive daily rate, as specified below, and as specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

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

Contract Period	Name of Resource	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		

Total Estimated Cost: \$_____

Option to Extend the Contract Period

During the extended period of the Contract, the Contractor will be paid the following firm all-inclusive daily rate to perform all the Work in relation to the contract extension.

Option Period 1 to Extend Contract Period	Name of Resource	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		

Option Period 2 to Extend Contract Period	Name of Resource	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		

Option Period 3 to Extend Contract Period	Name of Resource	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		

7.7.2 Limitation of Liability -- Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ _____ *[insert amount at contract award]*. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.3 Method of Payment - Authorized TA

7.7.3.1 TA subject to a limitation of expenditure

For the Work specified in an authorized TA subject to a limitation of expenditure:

A. Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

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

7.7.4 Taxes – Foreign-based Contractor

Unless specified otherwise in the Contract, the price includes no amount for any federal excise tax, state or local sales or use tax, or any other tax of a similar nature, or any Canadian tax whatsoever. The price, however, includes all other taxes. If the Work is normally subject to federal excise tax, Canada will, upon request, provide the Contractor a certificate of exemption from such federal excise tax in the form prescribed by the federal regulations.

Canada will provide the Contractor evidence of export that may be requested by the tax authorities. If, as a result of Canada's failure to do so, the Contractor has to pay federal excise tax, Canada will reimburse the Contractor if the Contractor takes such steps as Canada may require to recover any payment made by the Contractor. The Contractor must refund to Canada any amount so recovered.

7.7.5 Discretionary Audit

C0705C (2010-01-11), Discretionary Audit

7.8 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 the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
 - b. a copy of the monthly progress report.
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the Project Authority for certification and payment;
 - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.9 Certifications and Additional Information

7.9.1 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.

7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____ (*insert the name of the province or territory as specified by the Bidder in its bid, if applicable*).

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 Articles of Agreement;
- b. the supplemental general conditions 2010B (2016-04-04), General Conditions – Professional Services (Medium Complexity);
- c. the general conditions 2035 (2016-04-04), General Conditions - Higher Complexity - Services;
- d. Annex A, Statement of Work;
- e. Annex B, Basis of Payment;
- f. Annex C, Security Requirements Check List;
- g. Signed Task Authorizations (including all of its annexes, if any);
- h. the Contractor's bid dated _____, (*insert date of bid at the time of contract award*).

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CSPS-RFP-17NL-1610
N° de réf. du client - Client Ref. No.
2017-1610

N° de la modif - Amd. No.
File No. - N° du dossier
CSPS-RFP-17NL-1610

Id de l'acheteur - Buyer ID
E16
N° CCC / CCC No./ N° VME - FMS
0520-C10-IHBOB-54819-C43228

7.12 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor)

Note to Bidders: *Either this clause or the one that follows, whichever applies (based on whether the successful bidder is a Canadian Contractor or Foreign Contractor), will be included in any resulting contrat.*

SACC Manual clause [A2000C](#) (2006-06-16), Foreign Nationals (Canadian Contractor)

OR

SACC Manual clause [A2001C](#) (2006-06-16), Foreign Nationals (Foreign Contractor)

7.13 Insurance

SACC Manual clause [G1005C](#) (2016-01-28), Insurance – No Specific Requirement

ANNEX "A"
STATEMENT OF WORK

1. Title

Canadian regional and local subject matter expert, study tour coordinator for the School's Executive Leadership Development Program.

2. Objective

The Canadian School of the Public Service (CSPS or the School) has a requirement for a subject matter expert on various Canadian local and regional issues and well networked across the public and private sectors, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations, in the following regions: 1) British Columbia; 2) Prairies; 3) Ontario & Quebec; and 4) Atlantic provinces. The Consultant is required in order to assist with the development, implementation and coordination of multi-day experiential learning program study tours as part of the Executive Leadership Development Program (ELDP). The first study tours are anticipated in the Fall of 2018. The School intends to award one or multiple contracts; up to one for each region.

The Contractor is expected to have a diverse network of contacts within the government, private, academic, non-government sectors and local community groups. The Contractor must, on an "as and when required basis", be able to secure meetings with leaders, arrange site visits to fulfil the program requirements and objectives.

3. Background

The CSPS is the common learning service provider for the Public Service of Canada. It was created to bring a unified approach to serving the common learning and development needs of public servants and to help ensure that all federal public service employees across Canada have the knowledge and skills they need to meet the challenges of the public service of the 21st century.

The School is committed to promoting a strong corporate culture in the Public Service, fostering a culture of learning, and being a catalyst and resource for the ongoing development of the Public Service as a learning organization. The Learning Program Branch (LPB) is responsible for designing and implementing the School's curriculum for public servants, implementing learning programs, and delivering training services offered by the CSPS across Canada. The LPB also oversees the design and delivery of the leadership development programs and courses for supervisors, managers and executives across the broad spectrum of management levels for all federal government departments and agencies.

Following the Clerk of the Privy Council's announcement in June 2016 regarding the introduction of two new leadership development programs for public service executives EX 04 and EX 05 levels (e.g. Senior Vice President equivalent who report to CEO or President) and for EX 01 to EX 03 levels (e.g. Directors, senior Directors, to Associate VP), the Treasury Board Secretariat (Office of the Chief Human Resources Officer), has asked the CSPS to develop, design and deliver the learning components for both programs. This includes the delivery of individual and group experiential learning through case methods, study tours and in-class leadership development. Participants will learn from panels of various subject matter experts, from leadership development, self-reflection and through dialogues and exchanges with various stakeholders. Learning will take place through the integration of individual, small group and cohort learnings.

The ELDP provides senior executives with a unique opportunity to learn about the inner-workings of diverse regions of Canada and the various and varied concerns of different regions. The study tours are intended to increase senior executives' understanding of regional complexities and sensitivities within communities and industries. Such exposure will help these leaders to continue to advise and develop policies to improve Federal government programs and services and to manage complex transformation in a rapidly shifting environment.

To achieve this, the ELDP program will be deploying Cohorts of senior executives to initially travel to the regions of the Prairie provinces and the North-West Territories and provide an opportunity to interact with and learn from local leaders from the private sector, Municipal, Provincial, Territorial, Federal governments, academic and non-government organisations within the regions visited.

4. **Scope**

CSPS requires the expertise from one or more regional subject-matter expert(s) on various Canadian local and regional issues and public & private sectors to develop, implement and coordinate study tours for cohorts of senior executives. The Contractor is expected to have a diverse network of contacts within the government, private, academic, non-government sectors and local community groups. The Contractor must be able to secure meetings with leaders, arrange site visits to fulfil the program requirements and objectives.

The study tours will be for up to 7 days, including travel between 2 or 3 cities within each region. Each cohort is made of 25-35 senior executives which will be divided into two or three groups for the purposes of the study tours. It is anticipated that there will be one cohort travelling in September; one cohort will be travelling in October, and another cohort will be travelling in January.

The purpose of these study tours is to highlight and outline how each region works by:

- Focusing on key differences between regions and how those differences impact decisions and decision making;
- Highlighting key institutions, actors and influencers in both the private, public and cultural sectors;
- Fostering awareness and understanding of regional socio-economics and the challenges and opportunities found in each region; and
- Emphasizing successes in innovation and collaboration within the region.

5. **Tasks**

The Contractor must perform the following tasks:

- Provide expert advice and guidance on current and topical issues facing the regions and recommend options of cities to travel to during the study tour;
- Provide verbal input to program leads on content development by participating in weekly or bi-weekly conference calls organized by CSPS Project Authority;
- Provide input on the program itinerary (timelines, organisations, stakeholder, site visits) to CSPS Project Authority;
- Exchange with stakeholders as required to organize the meeting time, location, and access their biographies;
- Arrange and participate in preparatory briefing calls with stakeholders and site visit hosts to discuss content and logistical details;
- Coordinate with the office of the stakeholders to reserve appropriate meeting/conference rooms to accommodate each study tour groups size;
- Act as point of contact for stakeholders and site visit hosts on behalf of CSPS Project Authority to facilitate the co-ordination, provide context;
- Lead and accompany the cohort on-site during the study tours;

- Provide assistance; work with senior executives, guide and stimulate discussion during the Case Studies visits, by welcoming and introducing stakeholders and providing linkages between each case study; and
- Contribute to the program by participating in a post-mortem discussion via conference call organized by CSPS Project Authority for an evaluation of lessons learned.

6. Deliverables

The Contractor must:

- Provide a list of potential organizations, stakeholders and site visits within ten (10) weeks of each study tour;
- Provide a draft an itinerary for each study tour within eight (8) weeks of each study tour;
- Provide a final itinerary for each study tour within six (6) weeks of each study tour for approval by CSPS Project Authority; this must also include a list and coordinates of all stakeholders, their biographies and confirmed site visits including timetables and logistical information;
- Lead and accompany the cohort during the study tours and help facilitate on-site coordination and transportation from meetings to meetings, and
- Provide all deliverables in English, electronically in MS Word to CSPS Project Authority.

7. Reporting Requirements

The Contractor must submit one (1) electronic copy in English, in MS Word, to the CSPS Project Authority:

- a workplan for the study tour with status on key tasks, every three (3) weeks, once the planning for the study tour has been initiated.
- an assessment report (outlining the lessons learned), within two (2) weeks after each study tour.

8. Client Support

CSPS will provide the following to the Contractor:

- Comments on draft documents (list of stakeholders and site visits, draft & final itineraries within five (5) working days from receipt;
- Translation of materials (English to French);
- Background documentation; program details, past study tour itineraries and stakeholder contacts, biographies of participants, etc.;
- Information on the proposed flights and accommodations for cohort participants of the study tours;
- Other assistance or support, as needed.

9. Meetings

The Contractor will be required to participate, either in person or by phone, at:

- The kick-off meeting organized by CSPS Project Authority, to discuss the program content and agenda development; this first meeting will be held within five (5) days after contract award;
- Regular progress/milestone meetings with CSPS Project Authority, scheduled on a weekly or bi-weekly basis; and
- Post-mortem discussion organized by CSPS Project Authority for an evaluation of lessons learned to be held within two (2) weeks after each study tour.

10. Location of Work, Work site and Point

Design, development and implementation Work of the study tours will be done at the Contractor's work site. The Contractor will be required to accompany the cohorts on the study tours.

11. Language of Work

The Work must be conducted in both official languages (English and French) or in English.

N° de l'invitation - Solicitation No.
CSPS-RFP-17NL-1610
N° de réf. du client - Client Ref. No.
2017-1610

N° de la modif - Amd. No.
File No. - N° du dossier
CSPS-RFP-17NL-1610

Id de l'acheteur - Buyer ID
E16
N° CCC / CCC No./ N° VME - FMS
0520-C10-1HBOB-54819-C43228

12. Travel and Living

The Regional Subject Matter Expert Study Tour Coordinator will be required to travel within one or more of the specified region(s) as identified in part 4 of the Statement of Work for the study tours in order to fulfill all deliverables under the scope of the Contract.

Any travel, accommodation, and incidental expenses related to the conduct of the Work are the sole responsibility of the Contractor. No travel, accommodation, or incidental expenses will be reimbursed under the resulting Contract.

ANNEX "B"
BASIS OF PAYMENT

FOR THE FOLLOWING REGION OF DELIVERY: 1) BRITISH COLUMBIA

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked, with no provisions for annual leave, statutory holidays and sick leave. Time worked ("Days Worked" in the formula below) which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Days Worked} = \frac{\text{Hours Worked}}{7.5 \text{ hrs. per day}}$$

A- Contract Period (From date of award ____ to ____) (for a period of one year from date of Contract award). *[Insert date at contract award]*

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

1.0 Professional Fees

The Contractor will be paid a firm all-inclusive daily rate as follows: *[insert data at contract award]*

Contract Period	Name of Resource	Number of Days	Firm All-Inclusive DailyRate (in CDN \$)
Study Tour Coordinator		45 days	

Total Estimated Cost of Professional Fees: \$_____ *[insert amount at contract award]*

2.0 Total Estimated Cost – Contract Period: \$_____ *[insert amount at contract award]*

B. Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

B.1 Option 1 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 1 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.2 Option 2 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 2 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.3 Option 3 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 3 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

ANNEX "B"
BASIS OF PAYMENT

FOR THE FOLLOWING REGION OF DELIVERY: 2) PRAIRIES

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked, with no provisions for annual leave, statutory holidays and sick leave. Time worked ("Days Worked" in the formula below) which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Days Worked} = \frac{\text{Hours Worked}}{7.5 \text{ hrs. per day}}$$

A- Contract Period (From date of award ____ to ____) (for a period of one year from date of Contract award). *[Insert date at contract award]*

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

1.0 Professional Fees

The Contractor will be paid a firm all-inclusive daily rate as follows: *[insert data at contract award]*

Contract Period	Name of Resource	Number of Days	Firm All-Inclusive DailyRate (in CDN \$)
Study Tour Coordinator		45 days	

Total Estimated Cost of Professional Fees: \$_____ *[insert amount at contract award]*

2.0 Total Estimated Cost – Contract Period: \$_____ *[insert amount at contract award]*

B. Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

B.1 Option 1 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 1 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.2 Option 2 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 2 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.3 Option 3 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 3 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

ANNEX "B"
BASIS OF PAYMENT

FOR THE FOLLOWING REGION OF DELIVERY: 3) ONTARIO AND QUEBEC

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked, with no provisions for annual leave, statutory holidays and sick leave. Time worked ("Days Worked" in the formula below) which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Days Worked} = \frac{\text{Hours Worked}}{7.5 \text{ hrs. per day}}$$

A- Contract Period (From date of award ____ to ____) (for a period of one year from date of Contract award). *[Insert date at contract award]*

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

1.0 Professional Fees

The Contractor will be paid a firm all-inclusive daily rate as follows: *[insert data at contract award]*

Contract Period	Name of Resource	Number of Days	Firm All-Inclusive DailyRate (in CDN \$)
Study Tour Coordinator		45 days	

Total Estimated Cost of Professional Fees: \$_____ *[insert amount at contract award]*

2.0 Total Estimated Cost – Contract Period: \$_____ *[insert amount at contract award]*

B. Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

B.1 Option 1 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 1 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.2 Option 2 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 2 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.3 Option 3 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 3 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

ANNEX "B"
BASIS OF PAYMENT

FOR THE FOLLOWING REGION OF DELIVERY: 4) ATLANTIC PROVINCES

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract.

Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked, with no provisions for annual leave, statutory holidays and sick leave. Time worked ("Days Worked" in the formula below) which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{Days Worked} = \frac{\text{Hours Worked}}{7.5 \text{ hrs. per day}}$$

A- Contract Period (From date of award ____ to ____) (for a period of one year from date of Contract award). *[Insert date at contract award]*

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

1.0 Professional Fees

The Contractor will be paid a firm all-inclusive daily rate as follows: *[insert data at contract award]*

Contract Period	Name of Resource	Number of Days	Firm All-Inclusive DailyRate (in CDN \$)
Study Tour Coordinator		45 days	

Total Estimated Cost of Professional Fees: \$_____ *[insert amount at contract award]*

2.0 Total Estimated Cost – Contract Period: \$_____ *[insert amount at contract award]*

B. Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

B.1 Option 1 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 1 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.2 Option 2 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 2 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

B.3 Option 3 to extend the Term of the Contract (From _____ to _____) (for an additional one year period). *[Insert date at contract award]*

Option 3 to extend the Term of the Contract	Name of Resource	Number of Days	Firm All-Inclusive Daily Rate (in CDN \$)
Study Tour Coordinator		45 days	

ANNEX "C" SECURITY REQUIREMENTS CHECK LIST



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

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

PARTIE A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	2. Branch or Directorate / Direction générale ou Direction	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail <i>CSPS requires the services of two "immunity to change" accredited coaches in order to design and deliver a 3 hours session on examining one's own assumptions, challenges and opportunities. (January 31, 2018) (multi-year)</i>		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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) <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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. <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> 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? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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 type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	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 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 <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		TOP SECRET <input type="checkbox"/>
TRÈS SECRET <input type="checkbox"/>		TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) <input type="checkbox"/>
TRÈS SECRET (SIGINT) <input type="checkbox"/>		TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

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

PART A / PARTIE A (SUPPLIERS / PARTIE A (FOURNISSEUR))

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? No / Non Yes / Oui
 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 / Non Yes / Oui

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

PART B / PARTIE 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 FIABILITE	<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 EMBLEMES			

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?
 Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
 If Yes, will unscreened personnel be escorted?
 Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C / PARTIE 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?
 Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
 Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / 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?
 Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

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

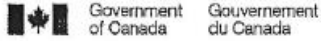
11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
 Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
 Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui

TBS/ICT 350-103(2004/12)

Security Classification / Classification de sécurité
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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 DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COMSEC TOP SECRET / COMSEC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / renseignements / biens / Production																
IT Media / Support IT / 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).

Security Classification / Classification de sécurité
--



ANNEX "D"
TASK AUTHORIZATION FORM

<u>TASK AUTHORIZATION FORM</u>		
Contract Number		
Task Authorization (TA) No.		
Contractor's Name and Address		
Original Authorization		
Total Estimated Cost of Task (GST/HST extra) before any revisions:		\$
TA Revisions Previously Authorized (as applicable) - Révisions de l'AT autorisées précédemment (s'il y a lieu)		
TA Revision No.		Authorized Increase or Decrease (GST/HST extra): \$
TA Revision No.		Authorized Increase or Decrease (GST/HST extra): \$
TA Revision No.		Authorized Increase or Decrease (GST/HST extra): \$
New TA Revision (as applicable)		
TA Revision No.		Authorized Increase or Decrease (GST/HST extra): \$
Total Estimated Cost of Task (GST/HST extra) after this revision:		\$
Contract Security Requirements (as applicable)		
This task includes security requirements. <input type="checkbox"/> No <input type="checkbox"/> Yes. Refer to the Security Requirements Checklist (SRCL) annex of the Contract. Remarks (as applicable)		

Required Work	
SECTION A - <u>Task Description of the Work required</u>	
SECTION B - <u>Applicable Basis of Payment</u>	
SECTION C - <u>Cost Breakdown of Task</u>	
SECTION D - <u>Applicable Method of Payment</u>	
Authorization	
<p>By signing this TA, the Project Authority or the Contracting Authority or both, as applicable, certify (ies) that the content of this TA is in accordance with the Contract.</p>	
Name of Project Authority	
Signature _____	Date _____
Name of Contracting Authority -	
Signature _____	Date _____
Contractor's Signature	
Name and title of individual authorized to sign for the Contractor	

Signature _____	Date _____