



**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS**

À:

Innovation, Science and Economic
Development Canada
Contracts & Materiel Management
235 Queen Street
Bid Receiving Area
Mail Scanning, Room S-143, Level S1
Ottawa, ON K1A 0H5
Attention: Chantal Lafleur

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

**Proposal To: Innovation, Science and
Economic Development Canada**

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

**Proposition à: Innovation, Sciences et
Développement économique Canada**

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

Comments – Commentaires

**This document contains a
Security Requirement - Ce document
contient une exigence de sécurité**

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Innovation, Science and Economic
Development Canada / Innovation,
Sciences et Développement économique
Canada
Contracts & Materiel Management /
Contrats et gestion du matériel
235 rue Queen Street
Ottawa, Ontario, K1A 0H5

Title - Sujet	
Organizational Design and Classification Consultant	
Solicitation No. - N° de l'invitation	Date
ISED188888	June 12, 2018
Solicitation Closes - L'invitation prend fin	Time Zone Fuseau horaire
at - à 02:00 PM on – le 27 juin, 2018	Eastern Standard Time (EST)
F.O.B. - F.A.B.	
Plant: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other: <input type="checkbox"/>	
Address Inquiries to : Adresser toutes questions à:	
Chantal Lafleur Chantal.lafleur2@canada.ca	
Telephone No. - N° de téléphone	
613-990-5937	
Destination – of Goods, Services, and Construction: Destination - des biens, services et construction:	
See Herein Précisé dans les présentes	

Instructions: See Herein

Instructions: Voir aux présentes

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



Task and Solutions Professional Services (TSPS)

FOR THE PROVISION OF

**ORGANIZATIONAL DESIGN AND CLASSIFICATION
CONSULTANT**

FOR

Innovation, Science and Economic Development Canada

ISED188888



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TITLE

Bid solicitation # ISED188888, issued under the framework of the E60ZT-16TSPS Supply Arrangement for Task and Solutions Professional Services (TSPS), for the provision of the following professional services: strategic and operational EX classification and organizational design advice and analysis to clients of the department, and who would provide coaching and mentoring to new EX Classification and Organizational Design Advisors on EX classification, policies, practices and organizational design matters.

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 Attachments include the List of Suppliers, Pricing Schedule, Technical and Financial Criteria, Additional Certifications Precedent to Contract Award and Additional certifications Required with the Bid.

The Annexes include the Statement of Work, Terms of Payment and Security Requirements Check List.

The list of suppliers being invited to bid on this bid solicitation is provided as Attachment 1 to Part 1. This list will not be updated if additional suppliers request copies of the bid solicitation.

1.2 Summary

1.2.1 Innovation, Science and Economic Development Canada (ISED) is soliciting bids for the services of a Contractor to provide strategic and operational EX classification and organizational design advice and analysis to clients of the department, and who would provide coaching and mentoring to new EX Classification and Organizational Design Advisors on EX classification, policies, practices and organizational design matters, as defined in Appendix "A", Statement of Work. The proposed period of contract shall be from date of contract award to March 31, 2019 with an irrevocable option in favour of ISED to extend the terms of the Contract by two (2) periods of one (1) year each under the same terms and conditions.

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

1.2.3 The resulting contract will not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to be treated as a separate procurement not forming part of the bid solicitation.



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.



ATTACHMENT 1 TO PART 1, LIST OF SUPPLIERS

Only selected TSPS SA Holders currently holding a TSPS SA under the E60ZT-16TSPS series of SAs are invited to compete.

To facilitate the process, Innovation, Science and Economic Development Canada has chosen to attach a copy of the RFP to allow those suppliers who were not formally invited to bid on this requirement to submit a proposal should they wish to do so. Only suppliers listed on Attachment 2 to Part 1 of the solicitation of this notice can submit a proposal. *(Suppliers listed in Attachment 2 to Part 1 of this notice should hereby consider themselves invited to bid (there is **no requirement** for the suppliers listed in Attachment 2 to Part 1 to further request to be added to the invited bidders list).*

SA Holders that are invited to compete as a joint venture must submit a bid as that joint venture SA Holder, forming no other joint venture to bid. Any joint venture must be already qualified under the E60ZT-16TSPS series as that joint venture at the time of bid closing in order to submit a bid.

The following SA Holders have been initially invited to bid on this requirement:

1. 3056058 Canada inc.
2. BDO Canada LLP
3. COPEM Consulting Inc.
4. Diane Brousseau & Associates Inc.
5. Hackett Consulting Inc.
6. IBM Canada Limited/IBM Canada No
7. KSAR & ASSOCIATES INC
8. Maplesoft Consulting Inc.
9. Naut'sa mawt Resources Group/Human Resources Systems Group Joint Venture
10. Paton & Associates Management Consulting Incorporated
11. PGF Consultants Inc.
12. TAG HR The Associates Group Inc.
13. The AIM Group Inc.
14. The Institute on Governance
15. University of Ottawa, Telfer School of Management



PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

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

Subsection 3.a) of Section 01, Integrity Provisions - Bid, of Standard Instructions 2003 incorporated by reference above is deleted in its entirety and replaced with the following:

a. at the time of submitting an arrangement under the Request for Supply Arrangements (RFSA), the Bidder has already provided a list of names, as requested under the [Ineligibility and Suspension Policy](#). During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one hundred and twenty (120) days.

2.2 Submission of Bids

Bids must be submitted only to Innovation, Science and Economic Development Canada (ISED) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Bidders are hereby advised that the Bid Receiving Area of ISED is open Monday to Friday inclusive, between the hours of 7:30 am and 4:30 pm, excluding Statutory Holidays. Bids transmitted to ISED by electronic mail will not be accepted.

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

Canada requires that each bid, at closing time, be signed by the Bidder or by an authorized representative of the Bidder.

The Bidder's signature indicates acceptance of the terms and conditions governing the resulting contract and the Minister reserves the right to reject any proposal including any condition proposed by the Bidder that would not be, in the opinion of the Contracting Authority, in Canada's interest.

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,

"fee abatement formula" means the formula applied in the determination of the maximum fee payable during the one-year fee abatement period when the successful bidder is a former public servant in receipt of a pension paid under the [Public Service Superannuation Act](#).

"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](#).

A contract awarded to a FPS who has been retired for less than one year and who is in receipt of a pension as defined above is subject to the fee abatement formula, as required by Treasury Board Policy.

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 Inquiries - Bid Solicitation

All inquiries 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.

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

PART 3 – BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

- Section I: Technical Bid (4 hard copies)
- Section II: Financial Bid (2 hard copies)
- Section III: Certifications (1 hard copy)
- 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; and
- 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](#).

To assist Canada in reaching its objectives, bidders should:



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1. use paper containing fiber 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 color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

Section I: Technical Bid

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

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

Resumes for proposed resources: Unless specified otherwise in the RFP, the technical bid should include resumes for each of the consultants identified in the bid solicitation that demonstrate that each proposed individual meets the requirement(s).

Note: When applicable, each individual proposed with a university degree or college diploma, must possess, at a minimum, a certificate from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service, if obtained outside Canada. The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/1374/obtain-an-academic-credential-assessment-for-general-purposes/index.canada>.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

- A. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.
- B. Bidders must submit their rates FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.
- C. When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7 of the bid solicitation.

D. Price Breakdown

In their financial bids, bidders should provide a price breakdown for the price quoted in response to the pricing schedule detailed in Attachment 1 to Part 3.

1. Estimated Cost of Professional Fees

1.1 For each labour category, bidders should provide: a) the estimated cost of professional fees; and b) the cost basis (comprised of the quoted all inclusive fixed daily rate; and the estimated corresponding number of working days. Bidders should specify the number of hours included in a working day, exclusive of meal breaks.

Under any resulting contract, Canada will not accept the travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

2. Estimated Cost of Subcontracts



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Bidders should 1) identify any proposed subcontractors; and 2) provide a price breakdown submitted in accordance with paragraph D of this section of Part 3 of the bid solicitation for each one.

3. Estimated Cost of Other Direct Charges

Bidders should 1) identify the categories of other direct charges anticipated (such as long distance communications and rental); and 2) provide the estimated cost and the cost basis for each one.

4. Applicable Taxes

The price breakdown must not include the Applicable Taxes. [Instructions to the Bidder: consult Article 01, interpretation, of the 2035, General Conditions - Higher Complexity services, for the definition of the term "Applicable Taxes".]

E. SACC Manual Clauses

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

F. Electronic Payment of Invoices - Bid

Canada requests that bidders:

1. select option 1 or, as applicable, option 2 below; and
2. include the selected option in Section II of their bid.

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

Option 1:

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

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

Option 2:

The Bidder does not accept to be paid by Electronic Payment Instruments.

Section III: Certifications

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

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 and facsimile numbers 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:
 - a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
 - 1) the name of the individual;
 - 2) the date of birth of the individual; and
 - 3) 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

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 all inclusive fixed daily rate (in Can \$) for each of the resource categories identified.

The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule 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.

The rates included in this pricing schedule includes the total estimated cost of any travel and living expenses that may need to be incurred inside the National Capital Region (NCR) defined in the [National Capital Act \(R.S.C., 1985, c. N-4\)](http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont), available on the Justice Website (<http://laws-lois.justice.gc.ca/eng/acts/N-4/page-9.html#docCont>).

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

	Stream and Category	Name of Proposed Resource	All-inclusive fixed Per-Diem Rate	Volumetric Data (estimated)	Total (CAD)
			A	B	C = A x B
1	Period 1 – Date of Contract Award – March 31, 2019				
1a	1.2 Organizational Design and Classification Consultant – Senior			99	
TOTAL PERIOD 1:					
2	Period 2 – April 1, 2019 – March 31, 2020				
2a	1.2 Organizational Design and Classification Consultant – Senior			156	
TOTAL PERIOD 2:					
3	Period 3 – April 1, 2020 – March 31, 2021				
3a	1.2 Organizational Design and Classification Consultant – Senior			156	
TOTAL PERIOD 3:					
3	Total Evaluated Price (Sum of Period 1, 2 & 3) (Applicable Taxes excluded):				\$ _____
4	Applicable Taxes			GST: HST: PST:	



PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

An evaluation team composed of representatives of Canada will evaluate the bids.

The evaluation team will determine first if there are two (2) or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive bids with a valid certification remain, the evaluation will continue among those bids which contain a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.

4.1.1 Technical Evaluation

4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.
Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.
- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.
Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.
- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.
Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:
 - o Contracts all signed by A;
 - o Contracts all signed by B; or
 - o Contracts all signed by A and B in joint venture, or
 - o Contracts signed by A and contracts signed by A and B in joint venture, or
 - o Contracts signed by B and contracts signed by A and B in joint venture.that show in total 100 billable days.
- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.



4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4.

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

4.1.2 Financial Evaluation

4.1.2.1 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.

4.1.2.2 Mandatory Financial Criteria

Refer to Attachment 1 to Part 4.

4.2 Basis of Selection – Highest Combined Rating of Technical Merit [70%] and Price [30%]

4.2.1.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

4.2.1.2 Bids not meeting 4.2.1.1 (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

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

4.2.1.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i): $TMS_i = OS_i \times 70$. OS_i is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in Attachment 1 to Part 4, determined as follows: total number of points obtained / maximum number of points available.

4.2.1.5 The combined rating (CR) of technical merit and price of each responsive bid (i) will be determined as follows: $CR_i = PS_i + TMS_i$.

4.2.1.6 The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. In the event two or more responsive bids have the same highest combined rating of technical merit and price, the responsive bid that obtained the highest overall score for all the point rated technical criteria detailed in Attachment 1 to Part 4 will be recommended for award of a contract.

4.2.1.7 The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of the technical merit and price, respectively.

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 120/135	OS2: 98/135	OS3: 82/135
Bid Evaluated Price	P1: C\$60,000	P2: C\$55,000	LP and P3: C\$50,000
Calculations	Technical Merit Score (OS_i x 70)	Pricing Score (LP/P_i x 30)	Combined Rating
Bidder 1	120/135 x 70 = 62.22	50/60 x 30 = 24.99	87.21
Bidder 2	98/135 x 70 = 50.81	50/55 x 30 = 27.27	78.08
Bidder 3	82/135 x 70 = 42.52	50/50 x 30 = 30	72.52



ATTACHMENT 1 to PART 4, TSPS FLEXIBLE GRID

In preparing their response, Bidders are encouraged to consult the TSPS Annex A: Streams and Categories website at: <http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/aact-tbps-anna-eng.html>) for additional information (such as Certifications Examples).

Flexible Grid for Category Human Resources Services Stream Flexible Grid

1. Human Resources Services Stream		
1.2 Organizational Design and Classification Consultant		
Levels of Expertise:		
Senior: Minimum 95 pts		
Intermediate: Minimum 70 pts		
Junior: Minimum 50 pts		
Relevant Education to the Consultant Category:		
University (PhD, Graduate, Undergraduate, degree): 35 pts		
College or CEGEP Diploma/Certificate: 25 pts		
High School Diploma: 20 pts		
Professional Certification:		
Relevant Professional Certification: 15 pts		
Relevant Experience in Consultant Category:		
≥1 yrs and <2 yrs: 12-23 months — 10 pts		
≥2 yrs and <4 yrs: 24-47 months — 20 pts		
≥4 yrs and <6 yrs: 48-71 months — 30 pts		
≥6 yrs and <8 yrs: 72-95 months — 40 pts		
≥8 yrs and <10 yrs: 96-119 months — 50 pts		
≥10 yrs: 120 + months — 60 pts		
Education	Résumé	Points
Certification		Points
Experience		Points



ATTACHMENT 2 TO PART 4, TECHNICAL CRITERIA

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.

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)		
For the purpose of the mandatory technical criteria specified below, the experience of the Bidder and its subcontractors, affiliates and suppliers will be considered.		
Number	Mandatory Technical Criterion	Bid Preparation Instructions
MT1	The Bidder must submit a detailed CV of their proposed resource demonstrating that they meet the minimum mandatory requirements (educational, professional designations and work experience), as per attachment 1 to Part 4, The Flexible Grid for the following resource category: Organizational Design and Classification Consultant (Level 3).	
MT2	The Bidder's proposed Organizational Design and Classification Consultant (Level 3) must have a University degree from a recognized university with acceptable specialization in Human Resources Management, Labour or Industrial Relations, Psychology, Public or Business Administration, Organizational Development, Education Sciences, Social Sciences, Sociology, or in any other field relevant to the work to be performed or equivalent based on their education, training and/or experience. The Bidder must provide a copy of the degree in their proposal.	
MT3	The Bidder's proposed Organizational Design and Classification Consultant(s) (Level 3) must have a valid accreditation in classification with recent experience (within the last five (5) years) in classification. The Bidder must provide a copy of the certificate in their proposal or the accreditation number and proof of recent experience in classification.	
MT4	The Bidder's proposed Organizational Design and Classification Consultant (Level 3) must have five (5) years of experience in performing classification at the operational EX level and must have recent (within the last five (5) years) experience using the Executive Group Position Evaluation Plan. The Bidder must provide a minimum of three (3) project summaries supporting where such experience was obtained. The following details must be provided for each of the summaries submitted: -Name of department(s); -Date and duration of the project; -Involvement in the project and type of work performed; and the -Reference/Contact person.	



	<p>The above information must be stated in the Bidder's proposal and the Bidder must provide specific reference to where this information is found in the proposed resource's CV.</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) and Scores		Maximum Number of Points	Minimum Number of Points
RT1	<p>In addition to MT 4, The Bidder's proposed Organizational Design and Classification Consultant (Level 3) should have demonstrated experience in the following areas:</p> <ul style="list-style-type: none"> -performing organizational design analysis; -providing advice and guidance on organization and EX classification issues; and -providing advice on related policies, practices and tools. <p>The Bidder should provide four (4) projects supporting where such experience was obtained. The following details should be provided for each of the projects submitted:</p> <ul style="list-style-type: none"> -Name of department(s); -Date and duration of the project; -Involvement in the project and type of work performed; -Reference/Contact person. <p>If more than four (4) projects are included in the proposal, then only the first four (4) projects listed will be evaluated.</p> <p>Points will be allocated as follows:</p> <p>Up to 5 points for each area, up to a maximum of 15 points.</p>	15	
RT2	<p>In addition to MT 4, The Bidder's proposed Organizational Design and Classification Consultant (Level 3) should have demonstrated experience in the following areas:</p> <ul style="list-style-type: none"> - Critiquing and evaluating EX work descriptions; - conducting on-site reviews; - conducting relativity search; - preparing full EX classification rationales; and - Developing Treasury Board Submission <p>The Bidder should provide five (5) projects to support where such experience was obtained. The following details should be provided for each of the projects submitted:</p>	50	



	<p>-Name of Department(s); -Description of the projects; -Specific duties performed; -Samples of complete rationales and on-site review reports; and -Reference/Contact person.</p> <p>If more than five (5) projects are included in the proposal, then only the first five (5) projects listed will be evaluated.</p> <p>Points will be allocated as follows:</p> <p>Up to 10 points for each area, up to a maximum of 50 points.</p>		
<p>RT3</p>	<p>The Bidder's proposed Organizational Design and Classification Consultant (Level 3) should have demonstrated experience in providing coaching and mentoring to employees on executive classification, policies, practices and organizational design and supporting trainees through their accreditation process.</p> <p>The Bidder should provide three (3) Federal Government projects to support where such experience was obtained. The following details should be provided for each of the projects submitted:</p> <p>-Number and level of employees supported; -Name of department(s); - Key elements covered; and Reference/Contact person.</p> <p>If more than three (3) projects are included in the proposal, then only the first three (3) projects listed will be evaluated.</p> <p>Points will be allocated as follows:</p> <p>Up to 10 points per project, to a maximum 30 points.</p>	<p>30</p>	
<p>RT4</p>	<p>The Bidder's proposed Organizational Design and Classification Consultant(s) (Level 3) should have demonstrated experience in participating in and/or chairing EX classification committees.</p> <p>The Bidder should provide three (3) projects to support where such experience was obtained. The following details should be provided for each of the projects submitted:</p> <ul style="list-style-type: none"> ▪ Description of the committees involved in and type of positions evaluated; ▪ Description of specific duties (such as preparing committee reports, chairing the committee, etc.); ▪ Samples of complete committee reports; ▪ End results; and ▪ Reference/Contact person <p>If more than three (3) projects are included in the proposal, then only the first three (3) projects listed will be evaluated.</p>	<p>15</p>	



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	<p>Points will be allocated as follows:</p> <p>Up to 5 points per project, up to a maximum of 15 points.</p>		
RT5	<p>The Bidder's proposed Organizational Design and Classification Consultant (Level 3) should have demonstrated experience in providing informal training/information session to groups of Advisors or Executives on classification related matters.</p> <p>The Bidder should provide three (3) Federal Government projects to support where such experience was obtained. The following details should be provided for each of the projects submitted:</p> <ul style="list-style-type: none"> -Number and level of employees supported; -Name of department(s); -Key elements covered; and -Reference/Contact person. <p>If more than three (3) projects are included in the proposal, then only the first three (3) projects listed will be evaluated.</p> <p>Points will be allocated as follows:</p> <p>Up to 10 points per project, to a maximum 30 points.</p>	30	
Overall Score		140	98

Mandatory Financial Criteria

Bids must meet the mandatory financial criteria specified in the table inserted below.

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

Mandatory Financial Criteria (MF)	
Number	Mandatory Financial Criterion
MF1	The maximum funding available for the Contract resulting from the bid solicitation is \$267,150.00 (Applicable Taxes extra). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.



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 and Additional Information Required with the 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 website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.1.2 Additional Certifications Required with the Bid

The Bidder must provide with its bid the required additional certifications included in Attachment 1 to Part 5, Additional Certifications Required with the Bid.

5.2 Certifications and Information Required Precedent to Contract Award

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real procurement agreement of the [Ineligibility and Suspension Policy](#) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid List" available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) 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 Required Precedent to Contract Award

The required additional certifications to provide are included in Attachment 1 to Part 5, Additional Certifications Required Precedent to Contract Award.



**ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO
CONTRACT AWARD**

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.

2. Education and Experience

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

Date: _____

Signature: _____

Title: _____
(Title of duly authorized representative of business)

Name of Business: _____



PART 6 – SECURITY REQUIREMENTS

6.1 Security Requirement

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

- a. the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- b. the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
- c. the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

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

PART 7 – RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Appendix A.

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 replacements:

Section 08 – Replacement of Specific Individuals, of 2035 (2016-04-04) General Conditions – Higher Complexity – Services is deleted and replaced with the following:

1. if the Contractor is unable to provide the services of any specific individual identified in the Contract to perform the services, the Contractor must within five working days of the individual's departure or failure to commence Work (or, if Canada has requested the replacement, within ten working days of Canada's notice of the requirement for a replacement) provide to the Contracting Authority:
 - a. the name, qualifications and experience of a proposed replacement immediately available for Work; and
 - b. security information on the proposed replacement as specified by Canada, if applicable.Any assessment of the information provided will occur as per 2 (b) below.
2. Subject to an Excusable Delay, where Canada becomes aware that a specific individual identified under the Contract to provide services has not been provided or is not performing, the Contracting Authority may elect to:
 - a. exercise Canada's rights or remedies under the Contract or at law, including terminating the Contract for default under Article titled "Default of the Contractor"; or
 - b. assess the information provided under 1 (a) and (b) above or, if it has not yet been provided, require the Contractor propose a replacement to be rated by the Technical Authority. The replacement must have qualifications and experience that meet or exceed those obtained for the original resource and be acceptable to Canada. Upon assessment of the replacement,



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Canada may accept the replacement, exercise the rights in 2 (a) above, or require the Contractor to propose another replacement within five working days' notice.

3. Where an Excusable Delay applies, Canada may require 2 (b) above instead of terminating under the "Excusable Delay" Article. An Excusable Delay does not include resource unavailability due to allocation of the resource to another Contract or project (including those for the Crown) being performed by the Contractor or any of its affiliates.
4. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a resource stop performing the Work. In such a case, the Contractor must immediately comply with the order. The fact that the Contracting Authority does not order that a resource stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.
5. The obligations in this article apply despite any changes that Canada may have made to the Client's operating environment.

Section 17 - Interest on Overdue Accounts, of 2035 (2016-04-04) General Conditions - Higher Complexity - Services - will not apply to payments made by credit cards.

With respect to **Section 30 - Termination for Convenience**, of 2035 (2016-04-04) General Conditions - Higher Complexity - Services, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

- 04) The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract
- 05) Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of:
 - a. the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination; or
 - b. the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.
- 06) The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

7.2.2 Supplemental General Conditions

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

7.2.3 Inspection and Acceptance

The Project Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

7.2.4 Specific Person(s)

The Contractor must provide the services of the person to perform the Work as stated in Appendix B, Terms of Payment.

7.3 Security Requirement



7.3.1 The following security requirement (SRCL and related clauses provided by the [Contract Security Program](#) apply and form part of the Contract:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
 - a. Security Requirements Check List and security guide (if applicable), attached at Appendix C;
 - b. *Industrial Security Manual* (Latest Edition).

7.3.2.2 The Company Security Officer (CSO) must ensure through the [Contract Security Program](#) that the Contractor and proposed individuals hold a valid security clearance at the required level.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2019 inclusive.

7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year period 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 fifteen (15) 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

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.

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.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Chantal Lafleur

Title: Senior Contracts and Procurement Advisor

Department: Innovation, Science and Economic Development Canada

Telephone: 613-990-5937

Email: chantal.lafleur2@canada.ca



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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

(Will be completed at contract award)

The Project Authority for the Contract is:

Name:

Title:

Organization:

Address:

Telephone:

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

(Will be completed at contract award)

Name:

Title:

Telephone:

E-mail address:

7.6 Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid in accordance with the terms of payment, in Appendix B. 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.

7.7 Certifications and Additional Information

7.8.1 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.

7.8 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in *(Will be completed at contract award)*.

7.9 Priority of Documents

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

- a) the Articles of Agreement;
- b) the supplemental general conditions [4008](#) (2008-12-12), Personal Information;



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- c) the general conditions [2035](#) (2016-04-04), General Conditions - Higher Complexity - Services;
- d) Appendix A, Statement of Work;
- e) Appendix B, Terms of Payment;
- f) Appendix C, Security Requirements Check List;
- g) the Contractor's bid dated *(Will be completed at contract award)*.

7.10 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.



APPENDIX A - STATEMENT OF WORK

1.0 Project Title:

Strategic and operational executive (EX) classification and organizational design advice and analysis to clients of Innovation, Science and Economic Development (ISED).

2.0 Background:

Following the reorganization of multiple sectors to support the achievement of government priorities announced in Budget 2017 (including the implementation of the Innovation and Skills Plan) and following the arrival of a PE-01 EX Classification Advisor in development, the Executive Group Services and Leadership Development (EGSLD) team requires additional support from a Senior accredited classification consultant with knowledge and experience in the use and application of the Hay plan is required. The consultant will help address clients' classification needs and requirements and will provide coaching/mentoring to any new EX classification and org. design Advisors.

Over the past few years, EGSLD launched several PE-04 processes to fill permanently the three (3) EX Classification and Org. Design Senior Advisor positions, without any success. As it is difficult to hire Senior Advisors at the PE-04 level, EGSLD decided to hire at a lower level and to develop a junior Advisor. The plan for that PE-01 is to follow the PE developmental program to reach the PE-04 level. In the meantime, EGSLD needs to count on the help and expertise of an EX Classification Consultant to meet clients' objectives and requirements and to ensure excellence in service.

3.0 Project Requirement / Objective:

HRB requires an outside Consultant who would provide strategic and operational EX classification and organizational design advice and analysis to clients of the department to respond to increasing client demands, and who would provide coaching and mentoring to new EX Classification and Organizational Design Advisors on EX classification, policies, practices and organizational design matters, in order to build internal capacity within Innovation, Science and Economic Development Canada (ISED).

4.0 Scope of Work / Tasks:

The Contractor will provide EX organization design advice and analysis to clients of ISED and coaching/mentoring to any new EX classification and organization design Advisors.

4.1 Tasks:

The Contractor will be required, but not limited to, perform the following:

1. Analyze, assess and provide options for organizational design proposals;
2. Review existing EX structures and positions as well as proposed EX structure options and work descriptions in order to provide feedback and commentary to the clients. Identify need to create new EX positions and/or to review existing EX positions;
3. Provide advice and guidance on organization and EX classification issues, such as policies, practices and tools;
4. Meet with senior level management and clients to obtain buy-in or defend complex and sensitive organizational design and classification issues;
5. Evaluate EX work descriptions against the Executive Group Position Evaluation Plan and prepare full EX classification rationales;
6. Conduct relativity researches;
7. Conduct on-site reviews;



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8. Participate in and/or chair EX classification committees, provide advice on classification and relativity issues and prepare full committee reports;
9. Provide coaching, mentoring and on-the-job training to any new EX classification and org. design Advisors executive classification, policies, practices and organizational design.

5.0 Deliverables / Timelines:

The Contractor may be required to provide the following deliverables in electronic format (MS Word) or hard copies:

- Organizational change proposal reports and/or implementation plan;
- EX classification rationales;
- EX classification committee reports;
- On-site reports;

All work must be done in consultation with the Project Authority.

Progress reports will be submitted on a weekly basis indicating the work completed during the specified period.

6.0 Client Support:

ISED will provide the following to the Contractor, as needed:

- Relevant existing studies or other resource material;
- Meeting space;
- Current and proposed related organization charts, work descriptions and other pertinent documents;
- Advice and guidance from in-house subject matter experts will be available as required.

7.0 Work Location:

The work will be conducted on-site at ISED and off-site at the contractor's premises; however, the Contractor may be required to meet with the Project Authority and/or other ISED clients at Offices in the NCR.

8.0 Official Languages:

The work under this contract will be conducted in both official languages as required. Deliverables will be submitted in French and English. ISED will be responsible for translation if required.

9.0 Travel:

No travel is required for this project. Therefore, no travel and living expenses will be reimbursed under the resulting contract.

10.0 Security:

The Contractor's resource must have a valid security clearance at the level of "Reliability" during the period of the resulting Contract.

11.0 Intellectual Property:



IP resulting from the work will remain with the Contractor.

12.0 Management of the Project:

This project will be managed by the EX Classification and Organizational Design, Human Resources Branch of the Corporate Management Sector.



ATTACHMENT 1 TO APPENDIX A – RESOURCE CATEGORIES RESPONSIBILITIES

1.2 Organizational Design and Classification Consultant

The required services may include, but are not limited to the following:

1. Performing strengths, weaknesses, opportunities, and threats (SWOT) analysis;
2. Leading organization and classification projects following project management principles;
3. Developing and/or implementing functional communities organizational models and associated generic work descriptions;
4. Developing functional charting;
5. Developing generic work description framework and develop appropriate learning tools for its application;
6. Analyzing current and end state, developing options and recommending new organizational structures (could include costing);
7. Reviewing existing work processes and organizational structures to determine their efficiency and effectiveness, and making recommendations;
8. Performing job, activities and responsibilities analysis;
9. Discussing with management in order to clearly define the activities and responsibilities of a specific function and/or organization, and provide options;
10. Reviewing, evaluating current work descriptions and recommending appropriate changes;
11. Developing and updating generic and specific work descriptions, and delineating responsibilities within streams of work;
12. Developing and implementing new classification standards and occupational group structures, as well as providing advice;
13. Providing advice and performing activities on conversion processes and redress mechanisms in the context of classification reform;
14. Identifying policy needs/concerns;
15. Researching and developing policies, guidelines, procedures and tools;
16. Researching, preparing relativity, evaluating work descriptions;
17. Participating in classification grievance committees and classification committees and writing reports;
18. Researching and preparing classification relativity studies;
19. Developing and/or providing advice on classification policies, procedures and tools;
20. Analyzing policies and business functional requirements to identify information, procedures and decision flows, and making recommendations;
21. Identifying organization for re-design; prototyping potential solutions, providing trade off information and suggesting a recommended course of action;
22. Identifying the required modifications to the automated processes;
23. Documenting workflow;
24. Articulating business requirements;
25. Providing advice in defining new requirements and opportunities for applying efficient and effective solutions: identifying and providing preliminary costs of potential options;
26. Provide mentoring, coaching assistance, and/or training;
27. Developing and delivering training;
28. Evaluating performance framework, developing performance needs and reporting systems and processes;
29. Researching, analyzing data and reporting on activities;
30. Carrying out performance monitoring and reporting on activities;
31. Developing and updating performance management systems, process and tools;
32. Providing advice and/or performing activities related to classification monitoring;
33. Researching, developing and implementing generic work descriptions approaches;
34. Reviewing, evaluating, new or revised work descriptions;
35. Compiling information and preparing reports; and
36. Developing, monitoring framework, conducting monitoring activities and preparing monitoring reports.



APPENDIX B – TERMS OF PAYMENT

1. Basis of Payment

Her Majesty the Queen in Right of Canada agrees to pay the Contractor a sum not to exceed \$ **(will be completed at contract award)**, plus applicable taxes, for the work performed as described in the attached Statement of Work (Appendix A).

1.1 Pre-Authorized Travel and Living Expenses:

Canada will not pay any travel or living expenses associated with performing the Work.

1.2 Initial Contract Period *(to be provided at contract award)*

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

a. Category of personnel: Organizational Design and Classification Consultant
Level of expertise: Senior
Name of Proposed Resources:
Firm per Diem rate: \$

Total Estimated Cost - Contract Period (excluding applicable taxes): \$
Applicable taxes: \$

1.3 Option Period One *(to be provided at contract award)*

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

a. Category of Personnel: Organizational Design and Classification Consultant
Level of Expertise: Senior
Name of Proposed Resource:
Firm per Diem Rate:
Total Cost:

Total Estimated Cost – Option Period One (applicable taxes excluded): \$
Applicable taxes: \$

1.4 Option Period Two *(to be provided at contract award)*

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

a. Category of Personnel: Organizational Design and Classification Consultant
Level of Expertise: Senior
Name of Proposed Resource:
Firm per Diem Rate:
Total Cost:



Total Estimated Cost – Option Period Two (applicable taxes excluded): \$

Applicable taxes: \$

For the purpose of this Contract, a day is defined as 7.5 hours of work, exclusive of meal breaks. Payment will be made for days actually worked, with no provision for annual leave, statutory holidays and sick leave. If time worked is more or less than a day, the all inclusive fixed daily rate must be prorated to reflect the actual time worked.

2. Limitation of Expenditures

No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- a. when it is 75 percent committed, or
- b. four (4) months before the contract expiry date, or
- c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.

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.

3. Method of Payment

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

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

3.1 SACC Manual Clauses

[A9117C](#) (2007-11-30), T1204 – Direct Request by Customer Department

[C0705C](#) (2010-01-11), Discretionary Audit

[C0711C](#) (2008-05-12), Time Verification

3.2 Electronic Payment of Invoices – Contract *(to be provided at contract award)*

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);



- f. Large Value Transfer System (LVTS) (Over \$25M).

4. Invoicing Instructions

The invoices shall be sent to address indicated below. Each invoice should include the contract number, the Contractor's name, address, tax registration number(s) (if applicable), and a description of the work performed, including the number of days worked when the per diem rates are applicable, during the period covered by the invoice. The applicable tax(es) shall be submitted as a separate amount(s) on the invoice.

Send invoices to:

(Will provide the name, title, address, telephone number and email address at time of contract award).

All of the above will be to the satisfaction of the Project Authority.



APPENDIX C - SECURITY REQUIREMENTS CHECK LIST

Common Centralized Professional Services: Security Requirement Checklists (SRCLs)

There are 45 common SRCLs as a result of a uniform national approach for the procurement of professional services. In the past, each professional services method of supply (MoS) had to develop their individual generic SRCLs. 45 common SRCLs have been developed and are to be used for all professional services MoS that have been harmonized.

For any questions, or to enquire if the 45 SRCLs can be used against specific MoS, please contact the appropriate MoS Standing Offer / Supply Arrangement Authority by accessing the [Contact Acquisitions](#) page.

The 45 Common Centralized Professional Services (PS) SRCLs can be found at the following link:

<http://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/31-eng.html>