



**RETURN BIDS TO:**

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Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC  
11 Laurier St. / 11, rue Laurier  
Place du Portage, Phase III  
Core 0B2 / Noyau 0B2  
Gatineau, Québec K1A 0S5  
Bid Fax: (819) 997-9776

**LETTER OF INTEREST  
LETTRE D'INTÉRÊT**

<b>Title - Sujet</b> Awards & Recognition products & srv	
<b>Solicitation No. - N° de l'invitation</b> E60HS-18AWRD/A	<b>Date</b> 2018-07-18
<b>Client Reference No. - N° de référence du client</b> E60HS-18AWRD	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$\$HS-651-75126
<b>File No. - N° de dossier</b> hs651.E60HS-18AWRD	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2018-08-28</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> Specified Herein - Précisé dans les présentes <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input checked="" type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Vallejo, Veronica	<b>Buyer Id - Id de l'acheteur</b> hs651
<b>Telephone No. - N° de téléphone</b> (873) 469-3357 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> Throughout Canada	

Comments - Commentaires

Instructions: See Herein

Instructions: Voir aux présentes

**Vendor/Firm Name and Address**

Raison sociale et adresse du  
fournisseur/de l'entrepreneur

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

**Issuing Office - Bureau de distribution**

Industrial Vehicles & Machinery Products Division  
11 Laurier St./11, rue Laurier  
7B1, Place du Portage, Phase III  
Gatineau  
Québec  
K1A 0S5

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## **PART 1 – PURPOSE AND NATURE OF THE RFI**

### **1.1 Purpose of the RFI**

Public Services and Procurement Canada (PSPC) is launching this Request for Information (RFI) in order to seek information and feedback from industry with regards to Awards and Recognition products and services which include Long Service and Retirement Awards, Instant Awards and Social Recognition.

The purpose of this Request for Information (RFI) is to achieve the following:

- a) Provide industry with an early opportunity to assess, comment and suggest changes to the Long Service and Retirement Awards, Instant Awards and Social Recognition requirements;
- b) Obtain information and feedback from industry with regards to the procurement solution;
- c) Determine the capability of industry to satisfy the requirements;
- d) Obtain industry feedback on any issues that would impact their ability to bid on a resulting request for a national master standing offer and/or deliver on the department's requirements;
- e) Gather industry knowledge, expertise and recommendations with regard to best practices that would increase the success of the solicitation and/or identify any risks that would impact the solicitation;
- f) Refine the requirement and further develop the procurement strategy related to the Social Recognition requirement;
- g) Invite industry representatives to the one-on-one sessions;
- h) Enhance competition, access and fairness of the resulting solicitation;
- i) Inform industry and the government to ensure that the formal RFSO solicitation process moves forward efficiently and has a high probability of successfully establishing National Master Standing Offers (NMSOs) for Awards and Recognition products and services.

Respondents are requested to provide answers and feedback related to Part 3 – Draft Departmental Procurement Strategy, Part 5 – Draft Documents and Part 6 – Questions to industry which contain questions for specific information being sought by the department.

### **1.2 Nature of the RFI**

This is not a bid solicitation. This RFI will not result in issuance of any NMSO or the award of any contract. As a result, potential suppliers of any goods or services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI. Nor will this RFI result in the creation of any source list. Therefore, whether or not any potential supplier responds to this RFI, this will not preclude that supplier from participating in any future procurement. Also, the procurement of any of the goods and services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to solicit information and feedback from industry with respect to the matters described in this RFI.

Nothing in this RFI will be construed as a commitment from PSPC to issue a solicitation for this requirement. PSPC may use non-proprietary information provided in this review and/or in the preparation of any formal solicitation document.

PSPC will not be bound by anything stated herein and reserves the right to change at any time, any or all parts of the requirement, as it deems necessary. PSPC also reserves the right to revise its procurement approach, as it considers appropriate, either based upon information submitted in response to this RFI or for any other reason it deems appropriate.

## **PART 2 – RESPONSE INSTRUCTIONS AND INFORMATION**

### **2.1 Nature and Format of Responses Requested**

The department's current view of its requirement for Awards and Recognition products and services, the characteristics of the procurement solution it is currently contemplating, and the technical requirements are all detailed in Part 3 of this RFI.

The department is seeking input and responses to specific questions (refer to Part 6 – Questions to Industry) covering important elements of the requirement prior to proceeding with finalizing its procurement strategy.

Respondents are invited to provide comments regarding the content of Part 3 and related requirements included in this RFI by completing and returning the electronic format of Part 6 – Questions to Industry. Respondents should explain any assumptions they make in their interpretation of the requirements.

### **2.2 Response Costs**

PSPC will not reimburse any respondent for expenses incurred in responding to this RFI.

### **2.3 Treatment of Responses**

#### **2.3.1 Use of Responses**

Responses will not be formally evaluated. The responses received may be used by PSPC to develop or modify procurement strategies or any draft documents contained in this RFI. PSPC will review all responses received by the RFI closing date. PSPC may, in its discretion, review responses received after the RFI closing date.

#### **2.3.2 Review Team**

A review team composed of representatives of PSPC and the Treasury Board Secretariat (TBS) will review the responses. PSPC reserves the right to hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.

#### **2.3.3 Confidentiality**

Respondents should indicate and mark any portions of their response that they consider proprietary or confidential. PSPC will handle these portions in a confidential manner in accordance with the Access to Information Act of Canada.

#### **2.3.4 Follow-up Activity**

PSPC may, at its discretion, contact any respondents to follow up with additional questions or for clarification of any aspect of a response. PSPC may, at its discretion agree to meet with respondents to provide respondents with the opportunity to present and/or demonstrate their capabilities in relation to this RFI.

Respondents' presentations are at no obligation to PSPC and respondents will be responsible for all costs associated with PSPC's invitation to make a presentation.

## **2.4 Contents of this RFI**

This RFI contains a draft procurement strategy including draft technical requirements and respondents should anticipate that requirements may be added to or deleted from any resulting solicitation that may be published by PSPC in the future. Comments regarding any aspect of this RFI are requested. This RFI also contains specific questions addressed to the industry.

### **2.4.1 Historical Data**

The data provided in Annex A - Historical Data represents the number of gifts and awards supplied by the two current NMSOs (Long Service and Retirement Awards Program and Instant Awards Program). The data is being provided to respondents purely for information purposes. Although it represents the best information currently available to PSPC, there is no guarantee that the data is complete or free from error.

## **2.5 Format of Responses**

### **2.5.1 Response preparation**

PSPC requests that respondents submit their responses electronically in MS Word, PDF or compatible formats. Responses can be provided by email. CD, DVD or USB key are acceptable. Hardcopy responses will also be accepted but is not the preferred option.

An electronic copy of Part 6 – Questions to Industry can be requested to the NMSO Authority.

### **2.5.2 Response content**

The first page of each document of the response provided should contain:

- a) The RFI number
- b) The name of the company that the respondent's is representing;
- c) The title, the name and the contact information of the respondent's; and,
- d) The date of submission of the documents.

All pages should be identified with the company's name along with page numbers.

## **2.6 Enquiries**

PSPC will not necessarily respond to enquiries in writing or by circulating answers to all potential suppliers as this is not a solicitation process. However, respondents with questions regarding this RFI may direct their enquiries to the Standing Offer Authority named below:

Name: Veronica Vallejo  
Title: Supply Specialist  
Division: Industrial Vehicles, Machinery Products and Logistics Division - HS

Address: Public Services and Procurement Canada  
PDP III 7B1  
11 Rue Laurier  
Gatineau, Quebec K1A 0S5  
Canada

Telephone: 873-469-3357  
Email: veronica.vallejo@pwgsc-tpsgc.gc.ca

## **2.7 Submission of Responses**

### **2.7.1 Time and Place for Submission of Responses**

Suppliers interested in providing a response should deliver it electronically or by mail to the

attention of the Standing Offer Authority by the time and the date on page 1 of the RFI to the address indicated in Part 2 section 2.6.

#### **2.7.2 Responsibility for Timely Delivery**

Each respondent should ensure its response is delivered on time to the correct email address or location.

#### **2.8 Security Requirements**

There are no security requirements associated with responding to this RFI.

However, future procurement actions undertaken in support of the Social Recognition requirement might require a government security clearance. Suppliers interested in being sponsored should contact the Standing Offer Authority.

#### **2.9 Official Languages**

Responses to this RFI are requested to be presented in either of the official languages of Canada.

#### **2.10 Industry Engagement**

As part of the Industry Engagement, Canada will offer one-on-one sessions for interested suppliers. Further details related to the one-on-one sessions are provided at Part 4 – Industry Engagement.

PSPC will not reimburse any respondent for expenses incurred in relation to the attendance to the one-on-one sessions.

## **PART 3 – DRAFT DEPARTMENTAL PROCUREMENT STRATEGY**

### **3.1 Introduction**

In an effort to streamline the procurement of Awards and Recognition products and services, Canada is intending to issue National Master Standing Offers (NMSOs) to procure awards and recognition products and services including:

- 1 – Long Service and Retirement Awards
- 2 – Instant Awards
- 3 – Social Recognition

Offerors will have the ability to submit an offer taking into consideration the three options presented in the General Questions at Part 6 – Questions to Industry.

Identified Users:

- The Federal Identified Users authorized to make call-ups against the Standing Offer include any government department, agency or Crown corporation listed in Schedules I, I.1, II and III, of the Financial Administration Act, R.S., 1985, c. F-11.

Offerors must supply Awards and Recognition products and services to Identified Users of the Government of Canada across the country, including locations within Comprehensive Land Claims Settlement Agreements (CLCSA's), on an as-and-when requested basis.

The NMSOs will be for an initial period of two (2) years with an option to extend for two (2) additional periods of one (1) year.

Unless specified otherwise, 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).

### **3.2 Background**

It is part of PSPC's mandate to plan, execute and manage the procurement of certain Goods and Services on behalf of Identified Users who will be authorized to use the NMSOs to fulfill their requirements for Awards and Recognition products and services.

The preferred method of supply is a NMSO. A NMSO is a procurement instrument much like a catalog with pre-determined pricing and it is used by many departments, agencies and Crown corporations throughout Canada. The purpose of a NMSO is to streamline the procurement process by awarding one NMSO to an Offeror from which multiple call-ups (technical term for orders, subsequent contracts) may be placed. A NMSO holder may receive several orders throughout the term of the NMSO.

### **3.3 Basis of payment**

The basis of payment for the current Long Service and Retirement Awards Program and Instant Awards Program are pre-established firm all-inclusive costs per item.

Canada is seeking input from industry to revise the current basis of payment for the Long Service and Retirement Awards Program and Instant Awards Program and to refine the basis of payment for the Social Recognition requirement.

The basis of payment for the Awards and Recognition products and services will have to take into consideration the three options presented in the General Questions at Part 6 – Questions to Industry.

**3.4 Questions to industry**

Respondents responding to this RFI are requested to answer questions listed in Part 6 – Questions to Industry as well as to provide any additional comments regarding any part of the procurement strategy outlined in the RFI and the attached draft documents or annexes. A MS Office version of Part 6 – Questions to Industry is available on Buy & Sell.

**3.5 Technical Documents**

Draft Annex A – Statement of Work of Long Service and Retirement Awards and its appendix, Draft Annex B – Statement of Work of Instant Awards and its appendix and Draft Annex C – Statement of Requirements of Social Recognition outline the technical requirements of each requirement. The draft technical documents outline in detail each individual technical requirement of all Awards and Recognition products and services sought by Canada.

## **PART 4 – INDUSTRY ENGAGEMENT**

### **4.1 Invitation to one-on-one sessions**

The one-on-ones sessions will be held at 11, Laurier St., Place du Portage, Phase III, Gatineau (QC) K1A 0S5, in boardroom 7B1-208 from August 7 to August 10, 2018.

Suppliers are requested to confirm their attendance by providing, in writing, to the Standing Offer Authority, the name(s) of the person(s) who will be attending, the invitation form and a list of potential concerns they wish to discuss no later than August 3, 2018.

One-on-one sessions will allow interested suppliers to present their companies, solutions, pose their questions and raise their concerns.

Attendance to the one-on-one sessions are voluntary. While Canada participants do not plan to provide new information during the one-on-one sessions, any new information discussed will be posted through an update to the RFI on Buy and Sell.

Suppliers who do not attend the one-on-one sessions will not be precluded from submitting a response to the RFI.

**INVITATION FORM**

Please fill-out the invitation form in order to confirm your attendance to the one-on-one sessions by checking or indicating your order of preference of date and time and the number of participants that will be attending the sessions.

Canada will make every effort to satisfy your preferred date and time, however should many suppliers request the same time, Canada will proceed on a first-come, first-served basis.

<b>Company's name</b>	
<b>Point of contact</b>	
<b>Address</b>	
<b>Email</b>	
<b>Telephone number</b>	

<b>One-on-one sessions</b>			
<b>Date</b>	<b>Time</b>	<b>Availabilities</b>	<b># of attendees</b>
August 7, 2018	AM		
	PM		
August 8, 2018	AM		
	PM		
August 9, 2018	AM		
	PM		
August 10, 2018	AM		
	PM		

**List of attendees**

	<b>Names</b>	<b>Position</b>
1		
2		
3		
4		
5		

**DRAFT - ANNEX A**

**STATEMENT OF WORK**

**LONG SERVICE AND RETIREMENT AWARDS PROGRAM**

**1. REQUIREMENT**

This statement of work (SOW) outlines the tasks, products, services and work to be delivered by the contractor on behalf of the Office of the Chief Human Resources Officer (OCHRO), Treasury Board Secretariat (TBS), for the Long Service and Retirement Awards Program and related services to be used by participating departments, agencies and Crown corporations.

**2. BACKGROUND**

The *Financial Administration Act* grants deputy heads the authority to provide awards to employees. Accordingly, departments, agencies and Crown corporations in the federal public service may, at their discretion, recognize the major career milestones of 5, 10, 15, 20, 25, 30, 35, 40, 45 and 50 years of service or more in the public service, and recognize retirements.

**3. OBJECTIVE**

The contractor shall implement a Long Service and Retirement Awards Program that the departments, agencies and Crown corporations of the Public Service of Canada may use to recognize the service of employees who have worked in the federal public service for 5, 10, 15, 20, 25, 30, 35, 40, 45 or 50 years or more, and to recognize retirements.

Under the program, awards may be ordered through a website created and managed by the contractor. Moreover, the contractor shall fully manage the awards program and related services.

**4. SPECIFICATIONS**

The contractor shall develop and administer the Long Service Awards Program (for 5 to 50 years of service or more and for retirements after 10 years of service or more). The work shall include tasks required to support the various departments, agencies and Crown corporations, specifically receiving orders, providing awards and certificates, quality control, administrative support, inventory maintenance and management, technical support, and the distribution of selection packages containing a sample of each award and a ring sizer.

The contractor shall have database software to identify long service awards recipients to meet the different needs of each department, agency and Crown corporation.

The contractor shall sign an agreement with Tree Canada to develop a green option that will serve as a legacy for future generations. For each long service award given, a tree

shall be planted in the recipient's Canadian region at no additional cost to Canada. Each recipient shall receive a tree-planting certificate along with the award selected. The location of the planting shall be indicated on the certificate.

In the event that a special celebration shall take place and require an additional logo, it will then be possible to add it to the permanent plaque or certificates, at no additional cost to Canada.

#### **4.1 Long Service Awards and/or Career Milestone Program**

The contractor shall work with environmentally responsible partners that have credible certifications, that is, reliable, trustworthy sources, for each award given. The awards shall be made or assembled in Canada as defined by the Competition Bureau of Canada.

For each milestone recognized, the contractor shall develop a green option for which each gift is an environmentally responsible product, that is, green purchases that take environmental impacts into account and that are made under socially responsible conditions (for example, fair trade). The product is considered to be green when the environmental impacts of its manufacture, from start to finish, have been minimized. This is the "eco" part of the word "eco-concerned". The "concerned" part suggests that the item's manufacture will improve the positive effects for society.

This option shall provide an opportunity to learn more about sustainable development and take concrete action to protect the environment. In this category, each gift shall include a certificate describing where it is from, what it contains and how it was made.

Should the same contractor be awarded both standing offers, the selection of gifts for long service awards and/or career milestone awards shall be different from the selection of gifts for instant awards. For each career milestone, the following award categories shall be available, in addition to the green awards category or green option:

##### **Category 1**

Jewellery (bracelet, necklace, ring, pendant, watch, earrings, etc.)

##### **Category 2**

Active lifestyle (suitcase, sports bag, computer bag, telescope, binoculars, etc.)

##### **Category 3**

Art Pieces (sculpture, paintings, etc., by Canadian, Métis, Inuit or First Nations artists – a description of the art and a biography of the artist should be included)

##### **Category 4**

Electronics (wireless headset, digital camera, e-reader, etc.)

##### **Category 5**

Well-being (salt lamp, luminotherapy, well-being gift basket, yoga kit, chest of tea from around the world, etc.)

## **Category 6**

Visually impaired or blind (indoor/outdoor talking thermometer, talking alarm clock, object locator/detector, games for visually impaired or blind, talking and/or large-number clocks, talking wrist tensiometer, etc.)

It must be noted that the description of the selected items shall use gender-neutral language that can refer to all federal employees, as described in the Gender-Based Analysis from Status of Women Canada.

When an item must be replaced, it shall be substituted by another from the same category. No other replacement will be given.

The contractor shall provide awards that correspond to the various career milestones as follows:

### **(1) 5 years of service**

A selection of fifteen (15) awards worth \$50.00 each, of which five (5) awards shall be a green option. The green options shall be clearly identified.

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient. Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

### **(2) 10 years of service**

A selection of fifteen (15) awards with a value of \$100.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. The green options shall be clearly identified.

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient. Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

### **(3) 15 years of service**

A selection of fifteen (15) awards with a value of \$150.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. From among the eight (8) traditional and contemporary awards, there will be a telescope, electronic items like a wireless micro music system from a recognized brand, jewellery (rings, bracelets, pendants, etc.)

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient.

Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

**(4) 20 years of service**

A selection of fifteen (15) awards with a value of \$200.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. The green option shall be clearly identified. From among the eight (8) traditional and contemporary awards, there will be electronic items like a noise-cancelling headset from a recognized brand, jewellery (rings, bracelets, pendants, etc.), brand-name watches, travel items, such as wheeled luggage, etc. In the event that one of the award choices is an oil or watercolour painting, the public employee shall have the opportunity to choose from among at least 3 options.

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient.

Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

**(5) 25 years of service**

A selection of fifteen (15) awards with a value of \$250.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. The green option shall be clearly identified. From among the eight (8) traditional and contemporary awards, there will be a telescope, brand-name watches, jewellery (rings, bracelets, pendants, etc.), and electronic items from a recognized brand.

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient.

Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

**(6) 30 years of service**

A selection of fifteen (15) awards with a value of \$300.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. The green option shall be clearly identified. From among the eight (8) traditional and contemporary awards, there will be brand-name watches, travel items, including luxury sport bags, jewellery (pendants, necklaces, chains, rings, etc.). In the event that one of the award choices is an oil or watercolour painting, the public employee shall have the opportunity to choose from among at least 3 options.

The gift shall be accompanied by a letter of congratulations and a permanent plaque indicating the years of service. It must be noted that the permanent plaque will only be given once per recipient. Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

**(7) 35, 40, 45 or 50 years of service or more**

A selection of ten (10) awards with a value of \$350.00 each; at least two (2) of the awards shall be a work of art, of which one shall represent Métis, Inuit or First Nations artists, and five (5) awards shall be a green option. The green option shall be clearly identified. From among the eight (8) traditional and contemporary awards, there shall be brand-name watches, jewellery (pendants, necklaces, bracelets, etc.), electronic items from a recognized brand, and travel items. In the event that one of the award choices is an oil or watercolour painting, the public employee shall have the opportunity to choose from among at least 3 options.

The gift shall be accompanied by a congratulatory letter and a permanent plaque indicating the years of service or a framed certificate, whichever the recipient chooses. It must be noted that the permanent plaque will only be given once per recipient. Afterwards, the addition of capsules, rings, clasps or other items indicating the years of service celebrated will be sent to the recipient.

**4.1.1 Awards and gifts (long service)**

The appropriate number of years of service shall be engraved on or affixed to each award or gift. Gifts shall not bear official symbols of the Government of Canada (for more information on the use of official symbols of the Government of Canada, please refer to the Federal Identity Program Policy, Appendix A). Awards shall not be personalized for each recipient.

The selection of awards for 5 to 50 years of service or more shall include a combination of classic and contemporary items accounting for general and demographic differences (for example, jewellery, writing instruments, crystal ware works of art, travel accessories and electronics) that instill a feeling of pride and a sense of belonging to the federal public service. All items shall be made or assembled in Canada as defined by the Competition Bureau.

For works of art, the contractor shall provide a description and details, as well as a certificate of authenticity and a biography of the artist. Items shall reflect the heritage of Canada. All wording shall be identical in both official languages.

**4.1.2 Permanent plaque (long service)**

The contractor shall provide a personalized permanent plaque with the recipient's name for each category of years of service as stated in section 4.1, from 5 years of service and onward. The plaque shall indicate the number of years of service on the capsule, ring, clasp or other part. The plaque shall be identical in both official languages, whichever the recipient chooses. Certificates shall bear the "Canada" wordmark and the corporate signature of the Government of Canada, in accordance with the Federal Identity Program (see Appendix A).

Each plaque will be accompanied by a letter with the prime minister's signature and deputy minister of the identified institution.

The permanent plaque has a value of \$75.00 and must be able to be kept in the recipient's office. The plaque will only be given once per recipient. It will be possible to add capsules, rings, clasps or other items to this plaque to indicate the years of service being celebrated – 10, 15, 20, 25, 30, 35 and onward. The capsule, clasp, ring or other item that indicates the years of service will be added to the plaque and may be added to the very structure of the plaque. The model of the plaque, which will be created by the contractor, shall be approved by the OCHRO.

#### **4.1.3 Presentation of the permanent plaque**

The permanent plaque shall be packaged in a presentation gift box that is designed for that purpose. The box shall be protected by stuffing that can be adjusted to the permanent plaque. The stuffing shall consist of a tissue paper that is pleasing to the eye.

#### **4.1.4 Certificates (long service)**

All recipients for whom the career milestone is 25 years or greater will have a choice between a permanent plaque or a certificate. The certificate shall be framed and shall include a glass pane. The frame shall be made of bamboo, assembled in Canada and have black- or clear-stained mouldings worth \$75.00.

The certificate shall indicate the number of years of service, have a different design depending on the number of years of service and be personalized for each recipient. Certificates shall be provided in an identical format in both official languages. Certificates shall bear the "Canada" wordmark and the corporate signature of the Government of Canada, in accordance with the Federal Identity Program (see Appendix A). Each certificate shall bear two "signatures". Sample signatures shall be sent to the contractor, who will be responsible for keeping them in a safe place.

On request, the contractor shall be able to provide a Braille certificate for any recipient with a visual impairment. At the time when the order is

placed, the contractor will provide the requesting institution with a firm unit price for any Braille certificate.

#### **4.1.5 Tree planting certificate**

Each long service award shall be accompanied by a tree planting certificate that shall indicate the location where the trees were planted. The certificate shall be small in size in order to use the least paper possible and shall be available in an electronic format in the event that the recipient chooses to receive it in that manner.

#### **4.1.6 Certificates (retirement)**

The contractor shall provide a certificate for each category of years of service before retirement. The certificate frames shall be made in Canada, as defined by the Competition Bureau. The contractor shall purchase preprinted retirement certificates. Retirement certificates shall be framed and personalized for each recipient. Certificates shall bear the name of the recipient, the number of years of service and the month and year of retirement. Certificates shall be provided in an identical format in both official languages.

On request, the contractor shall be able to provide a Braille certificate for any recipient with a visual impairment. At the time when the order is placed, the contractor will provide the requesting institution with a firm unit price for any Braille certificate.

#### **4.1.7 Congratulatory letter (5 to 50 years of service)**

The contractor shall provide a non-personalized letter for each long service category. The wording of the congratulatory letter is provided in Appendix B (attached). The letter shall be identical and offered in both official languages, based on the recipient's choice. It shall bear the "Canada" wordmark and the corporate signature of the Government of Canada, in accordance with the Federal Identity Program (see Appendix A). All letters will bear the signature of the prime minister of Canada and of the deputy minister of the identified institution. Examples of the signature shall be sent to the contractor, who will be responsible for keeping them in a safe place.

#### **4.1.8 Selection packages (long service and retirement)**

The contractor shall provide selection packages in both official languages and of equal quality for each category of years of service and for retirement years to the awards coordinators of departments, organizations and Crown corporations, as well as the representatives of OCHRO and PSPC.

Each category of years of service for long service awards and retirement awards shall be accompanied by its own selection package in both official

languages. Packages shall be updated to reflect any changes in awards selections, at no additional cost to Canada.

Packages shall include the following:

- a colour photograph of the awards selection for each category of years of service;
- a colour photograph of the certificate in both languages;
- a congratulatory letter, if needed;
- an order form to be completed by the employee, indicating the award selected and the language of the plaque or certificate;
- a standard ring sizer to help the recipients determine their ring size, if applicable.

#### **4.1.9 Packaging – Awards (long service and retirement)**

Each gift shall be accompanied by a reusable presentation bag. Aside from the packing required for the safe transportation of the items, no other packaging shall be presented to the recipient. Packaging should be designed to minimize waste, use recycled materials and meet industry standards to ensure the package reaches its destination in good condition.

#### **4.2 Retirement**

Retirement gift selections shall differ from long service award gift selections. The selection of gifts for retirements shall include a classic/traditional watch and other choices of recognition items that are suited to the retirement theme.

The contractor shall provide a selection of ten (10) gifts for each of the following categories of years of service completed before retirement:

##### **10 to 20 years of service**

A variety of ten (10) classic and traditional gifts worth \$250.00 that instills Canadian pride and salutes the career of the public employee. In the event that one of the award choices is an oil or watercolour painting, the public employee shall have the opportunity to choose from among at least 3 options, of which one shall represent works by Métis, Inuit or First Nations artists.

A certificate will be given with a bamboo frame, assembled in Canada and have gold- or bronze-stained mouldings worth \$45.00.

##### **21 years of service and onward**

An assortment of ten (10) classic and traditional gifts worth \$350.00 that instill Canadian pride and salutes the career of the public employee. In the event that one of the award choices is an oil or watercolour painting, the public employee shall have the opportunity to choose from among at least 3 options, of which one shall represent works by Métis, Inuit or First Nations artists.

A certificate will be given with a bamboo frame, assembled in Canada and have gold- or bronze-stained mouldings worth \$75.00.

## **5. PROGRAM REVIEW**

### **5.1 Annual review and evaluation**

The Long Service and Retirement Awards Program shall be reviewed and evaluated annually, and progress review meetings shall be held as required to monitor program effectiveness and review gift selection, which can be changed if needed, as far as they belong to the categories listed in section 4.1. Meetings shall be held at the offices of the contractor or PSPC or OCHRO, or by teleconferencing, at no additional cost to Canada. The contractor shall be responsible for taking notes and minutes, which will be shared with PSPC and OCHRO no later than one week after the meeting.

## **6. PROGRAM MANAGEMENT**

The contractor shall be responsible for the overall management of the Long Service and Retirement Awards Program. It shall describe and submit to the OCHRO its management method, that is, an effective program architecture, effective control systems, quality assurance, work completion reporting procedures, timelines and activities involving subcontractors.

### **6.1 Program manager**

The contractor shall designate a program manager who is proficient in both official languages (in writing and orally) and who possesses a minimum of three years of experience in managing a comparable awards program or similar program. The program manager shall be responsible for the following elements: the order-taking process, subcontractors' capacity for delivery of items, returns and exchanges, replacement of outdated items, inventory management, storage and distribution networks, emergency plans, support services, customer service, and the production of quarterly, annual or other reports as requested. The contractor shall work closely with the OCHRO and PSPC representatives, and with the various department, agency and Crown corporation coordinators.

### **6.2 Monitoring reports**

The contractor shall keep a record of all orders submitted by the awards coordinators of the various departments, agencies and Crown corporations. The contractor shall set up a numeric tracking system to track orders. At a minimum, the information below shall be retained for each order and provided to the program official (OCHRO) each month:

- name of the organization that placed the order;
- order form certifying that the person placing the order has the authority to do so and that the funds are available;
- order number;
- a description of the award ordered;
- a description of the permanent plaque or certificate ordered;
- quantity ordered;
- quantity delivered;
- total cost (plus applicable taxes);

- shipping or delivery costs, or additional costs (express delivery);
- a tree-planting report indicating the number of trees planted and the location and region where the tree will be planted;
- comments.

### 6.3 **Training**

The contractor shall establish a method for training awards coordinators with regard to the online ordering of long service awards. Initial training shall be offered online through a tutorial and shall cover (but not be limited to) the use of the website to process orders, for all awards coordinators at the various departments, agencies and Crown corporations, within two (2) months following the issuing of the standing offer. Any additional training shall be provided at no additional cost to Canada.

### 6.4 **Technology**

The contractor shall provide and manage a database software package to monitor the project and provide the required support. The database shall consist of a computer system to collect, store, process and use of a variety of information related to the Long Service and Retirement Awards Program.

The contractor shall create a website for the Long Service and Retirement Awards Program. The website shall be provided in both official languages and shall be of equal quality. It shall be compatible with the Internet Explorer web browser and be free of accessibility barriers, that is, it shall be accessible to persons with a visual impairment or physical disability. To that end, it shall be compliant with the Web Content Accessibility Guidelines 2.0. Web accessibility refers to the ability of persons with a disability to perceive, understand, navigate and interact with the web. The website shall be operational no later than two (2) months after the date on which the standing offer was issued.

The Long Service and Retirement Awards Program website shall provide at least the following information:

- One (1) colour photograph of each gift offered for each category of years of service, including the categories of years of service before retirement;
- A detailed description of each gift;
- One (1) colour photograph of the certificate offered for each category of years of service;
- A contact list for the different services;
- A “Frequently Asked Questions” section;
- Shipping costs indicated for items ordered before the order is placed;
- A list of coordinators that can be updated by national and regional coordinators;
- The order form;
- The toll-free number and the accessible fax number;
- E-cards with images portraying Canada’s natural beauty or festive events that shall serve as instant online recognition tools and that shall be appropriate for all sorts of occasions (“thank-you”, “job well done”, birthdays and special celebrations, etc.); and

- A section on various reports, such as general statistics, amount spent by institution, awards ordered, reports on the most popular prizes, returns, delivery times, coordinator satisfaction questionnaires, recipient satisfaction questionnaires, environmental participation, tree planting, etc.

## **6.5 Client Service**

The contractor shall provide client service in both official languages to all awards coordinators in the various departments, agencies and Crown corporations and shall respond to all inquiries from participating organizations through the toll-free number from Monday to Friday between 9:00 a.m. and 6:00 p.m. Eastern Standard Time (EST), and provide service online, by mail and by fax.

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**DRAFT APPENDIX 1**

**MANDATORY AND POINT-RATED TECHNICAL EVALUATION CRITERIA**

**LONG SERVICE AWARDS AND RETIREMENT PROGRAM**

The offers will be evaluated in accordance with the process outlined in Part XXX Evaluation and Selection as well as on all mandatory criteria detailed below. The Offeror must provide supporting documentation in their proposal to demonstrate that each mandatory technical requirement has been met. To facilitate the evaluation process, it is preferable that the Offeror complete the table below to indicate where the information is in their proposal. The offers that do not meet all of the mandatory requirements will be declared non-responsive and the offer will not be considered.

Item	Mandatory Criteria	Section for Bidder use only Indicate the page number for reference
M1	<p><b><u>M.1.1 Experience and Expertise of the Firm</u></b></p> <p><b>M.1.1.1</b> The Offeror must demonstrate that the firm has at least three (3) years of experience and expertise in the last five (5) years managing a Long Service and Retirement Awards Program and related services;</p> <p><b>M.1.1.2</b> The Offeror must have the ability to supply and deliver Gift selection items through an established national* distribution network. In order for the Bidder to demonstrate its supply and delivery capabilities, it must have a minimum of two (2) multi-year national agreements, each with an annual expenditure of \$500K, for the supply and delivery of Gift selection items for a client's recognition program, within the last five (5) years from the date of bid closing. Each agreement must have been in place for a minimum of 24 consecutive months.</p> <p><b>M.1.1.3</b> To demonstrate this experience, the Offeror must provide the following information regarding each agreement:</p> <ul style="list-style-type: none"> <li>• The name of the client organization;</li> </ul>	

**STAGE 1 - MANDATORY TECHNICAL EVALUATION CRITERIA:**

	<ul style="list-style-type: none"> <li>• The name and telephone number of the client organization’s contact;</li> <li>• The start date and end dates of the agreement, or the anticipated end date if still active;</li> <li>• The annual expenditure by the client organization on the agreement, and;</li> <li>• Summary details of the type of agreement in place which would demonstrate compliance with this requirement as described above.</li> </ul> <p>*National: the agreement provided for the supply and delivery of Gift selection items for a recognition program to a minimum of 5 provinces, territories, states or equivalent.</p>	
<p><b>M2</b></p>	<p><b>M.2.1 <u>Experience and Expertise of the Proposed Personnel</u></b></p> <p><b>M.2.1.1</b> The Offeror must demonstrate that the proposed Project Manager has at least three (3) years of experience in the last five (5) years in managing a Long Service and Retirement Awards Program and related services across Canada;</p> <p><b>M.2.1.2</b> The Offeror must demonstrate that the proposed Program Manager has experience in providing customer services in both of Canada’s official languages. This fluency must translate in the ability to communicate orally and in writing without any help and with a minimum of errors;</p> <p><b>M.2.1.3</b> The Offeror must have experience in developing a website in both official languages for a Long Service Award Program. The website must be navigable using Internet Explorer, be accessible to the visually impaired and to people with disabilities as described in the WCAG 2.0 criteria’s Guidelines (<a href="http://www.w3.org/TR/WCAG20/">http://www.w3.org/TR/WCAG20/</a>). The website must be set up and operational no later than two (2) months from date of issuance of the standing offer;</p> <p><b>M.2.1.4</b> The Offeror must have experience in meeting requirements for routine and urgent delivery, for the Long Service Awards Program as detailed in the Request for a Standing Offer (RFSO);</p> <p><b>M.2.1.5</b> The Offeror must demonstrate that the packaging for the Long Service Awards and Retirement Program is a green product, as specified in Annex A – Statement of Work.</p> <p><b>M.2.1.6</b> The Offeror must provide with its offer, one (1) sample selection kit for each milestone category including a “green” product, a tree certificate and a congratulatory letter for the Long Service Awards Program as detailed in Annex A – Statement of Work.</p>	

<p><b>M3</b></p>	<p><b><u>M.3.1 Perpetual Plaque and Certificates</u></b></p> <p><b>M.3.1.1</b> The offeror must demonstrate the capacity to produce a perpetual plaque, certificate or frame and a congratulatory letter for long service awards.</p> <p><b>M.3.1.2</b> The offeror must provide a draft design of:</p> <ul style="list-style-type: none"> <li>• A perpetual plaque</li> <li>• a congratulatory letter (in English and French) using the text provided in Annex C Congratulatory Letter of the Statement of Work</li> <li>• and a sample of</li> <li>• a certificate for milestones of 25 years and more (in English and French)</li> <li>• a frame for the certificate of 25 years and more</li> <li>• a frame for the retirement certificate</li> </ul> <p>All samples, images and descriptions will be evaluated against the technical requirements set out in Annex A – Statement of Work. All documents must be in both official languages and of equal quality. Failing to meet that obligation may result in the application being rejected.</p> <p><b>M.3.1.3</b> The Offeror must demonstrate the ability to produce green packaging, that is, designed to minimize the production of waste by using recycled materials. Each gift must be packaged in its regular commercial packaging (from the manufacturer) to ensure that it arrives in good condition at its destination. If applicable, the gift will be accompanied by a reusable presentation bag as specified in Annex A - Statement of Work.</p>	
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Long Service Awards – Gift Selection

Categories	5 years \$50	10 years \$100	15 years \$150	20 years \$200	25 years \$250	30 years \$300	35 and more \$350
<u>Green Option</u>							
Five (5) gifts per milestone							
Category 1 <u>Jewelry</u> (bracelet, necklace, ring, pendant, watch, earrings, etc.) Ten (10) gifts per milestone							
Category 2 <u>Active Lifestyle</u> (luggage travel set, sport bag, computer bag, telescope, binocular, etc.) Ten (10) gifts per milestone							
Category 3 <u>Art Piece</u> (sculpture, paintings, art pieces, from Canadian artists, metis, inuits or First Nations) Ten (10) gifts per milestone							
Category 4 <u>Electronics</u>							

(wireless headphones, cameras, Kindle, etc.) Ten (10) gifts per milestone								
Category 5 <u>Well Being</u> (salt lamp, luminotherapy, wellness basket, Visually impaired or hot yoga kit, tea of the world gift set, etc.) Ten (10) gifts per milestone								
Category 6 <u>Visually impaired or blind</u> (indoor\outdoor speaking thermometer, speaking alarm clock, object detector locator, games for the visually impaired, talking and\ or large figure watches, talking wrist sphygmomanometer, etc.) Ten (10) gifts per milestone								

**Retirement Gifts Selection**

Categories	From 10 to 20 years of service \$250	From 21 years of service and more \$350
Watch Two (2) gifts per milestone		
Art Piece Three (3) gifts per milestone		
Souvenir Items suitable for the theme of retirement. Five (5) gifts per milestone		

**STAGE 2 - POINT-RATED TECHNICAL EVALUATION CRITERIA:**

Only offers meeting the Mandatory Requirements - Stage 1, will be scored against the Point-rated Criteria detailed herein. Minimum points have been established for selected criterion and for the overall total score for the category. Offers must obtain the minimum number of points required or better, for each criterion, in order to be given further consideration.

By addressing each criterion directly and providing, at a minimum, the information requested, the Offeror has the possibility to maximize its potential score.

The following categories will be evaluated in Stage 2, based on a Point-rated System for their technical capabilities:

- A. **Project Management and Methodology; (350 points)**
- B. **Experience & Expertise; (300 points)**
- C. **Data Management and Reporting; (200 points)**

**LONG SERVICE AWARD PROGRAM: (Maximum: 850 points / Minimum: 595 points)**

Offerors must obtain a minimum overall pass mark of 595 points (70%), on a scale of 850 points, AND attain the minimum score of **70%** in each evaluation category, (**A through C**) - **Stage 2**, to be considered responsive.

**A) Project Management and Methodology (Maximum: 350 points/ Minimum: 245 points)**

The Offeror must provide sufficient detail to clearly demonstrate how they propose to meet the objectives/requirements and service level of the Long Service Award Program as detailed in the Statement of Work at **Annex "A"** The information provided must include, and will be evaluated in accordance with the following point rated criteria:

- 1.1 A detailed work plan outlining the methodology on how the work will be accomplished, including a list of tasks, a milestone schedule; developing a web-site exclusively for the use of the Long Service Award Program; respecting the rules of accessibility for the accessibility of contents of the Web 2.0 (WCAG), inventory and quality assurance processes; methods to meet delivery schedules; training with the use of a tutorial; reporting methods for tracking progress; customer/client service including a list of contacts and coordinators and a section with questions/answers.

**(Maximum: 250 points/Minimum: 175 points)**

1.2 A description of the infrastructure, including an organization plan, a program manager and team dedicated to the project; human and physical resources available (e.g. warehousing, security); identification of capabilities not currently in place and the plan to acquire them; problem resolution strategies and transition strategies.  
**(Maximum: 100 points/Minimum: 70 points)**

**B) Experience and Expertise (Maximum: 300 points/ Minimum: 210 points)**

The Offeror must provide detailed information on its experience and expertise, which will be evaluated in accordance with the following point-rated criteria:

1.1 Identification of a Project Manager for the Long Service Award and Retirement Program, including a detailed resume; their experience in a management capacity in similar projects; level of responsibility (managerial); number of projects managed; a minimum of three (3) years' experience is required;  
**(Maximum: 100 points/Minimum: 70 points)**

1.2 Identification of Team Members including a brief resume and their experience in similar projects; level of responsibility; number of projects involved;  
**(Maximum: 100 points/Minimum: 70 points)**

1.3 Identification of two (2) projects similar in nature and scope to this requirement performed within the last three (3) years, indicating their total monetary value; complexity; duration; list of tasks and responsibilities of personnel; web-based; any major problems and how they were resolved;  
**(Maximum: 100 points/Minimum: 70 points)**

**C) Data Management and Reporting (Maximum: 200 points/Minimum: 140 points)**

The Offeror must provide detailed information on their technical capabilities with respect to the data base software to be used for the Long Service Award and Retirement Program as well as the Progress and Tracking Reports, which will be evaluated in accordance with the following point rated criteria:

1.1 A description of the data base software to be used including procedures for managing the program; designed specifically for client; accessibility to customers; help lines, secured site; etc.  
**(Maximum: 100 points/Minimum: 70 points)**

1.2 A description of the format to be used for the progress and tracking reports, including their accessibility to the customer; method of distribution to customer; one (1) example of the progress report and one (1) sample of the tracking report are to be provided.  
**(Maximum: 100 points/Minimum: 70 points)**

**DRAFT - ANNEX B**

**STATEMENT OF WORK**

**INSTANT AWARD PROGRAM**

**1. Need**

This Statement of Work is intended to describe the tasks, products, services and work that shall be provided by the contractor for the Officer of the Chief Human Resources Officer (OCHRO), Treasury Board Secretariat (TBS), for an Instant Award Program that shall be used by the participating departments, agencies or Crown corporations.

The contractor shall be responsible for managing all aspects of the work outlined herein. The Officer of the Chief Human Resources Officer (OCHRO), TBS, sponsors the Instant Award Program.

The recipients of the Instant Award shall be employees of the participating departments of agencies or Crown corporations, which shall be responsible for purchasing and presenting the Award.

**2. BACKGROUND**

The *Financial Administration Act* confers to general administrators the authority to grant bonuses to employees. Departments, agencies or Crown corporations therefore have the authorization and the latitude necessary to implement practices and informal recognition activities adapted to their specific needs, such as instant awards.

**3. OBJECTIVE**

The contractor shall implement an Instant Award Program that all of the participating departments, agencies, or Crown corporations can use as informal recognition activities.

In the framework of the program, the awards may be ordered through a web site created and managed by the contractor. In addition, the contractor shall ensure the integral management of the award program and related services.

**4. SPECIFICATIONS**

The contractor shall develop and administer the Instant Award Program. The work shall include the functions required to support the different departments, agencies or Crown corporations, i.e. taking orders, providing the awards, quality control, administrative support, taking and managing inventory, technical support, the distribution of the selection packages that shall include a sample for each award, as well as a ring sizer that can be used for sizing.

The contractor shall have database software to identify instant award recipients, to respond to the different needs of each department, agency or Crown corporation.

#### **4.1 INSTANT AWARD PROGRAM**

The contractor shall give awards that correspond to the appropriate levels, as follows:

- Level 1: a selection of **nine (9) gifts** valued at \$10.00
- Level 2: a selection of **nine (9) gifts** valued at \$25.00
- Level 3: a selection of **nine (9) gifts** valued at \$50.00
- Level 4: a selection of **nine (9) gifts** valued at \$100.00
- Level 5: a selection of **nine (9) gifts** valued at \$150.00
- Level 6: a selection of **nine (9) gifts** valued at \$200.00
- Level 7: a selection of **nine (9) gifts** valued at \$250.00
- Level 8: a selection of **nine (9) gifts** valued at \$350.00
- Level 9: a selection of **nine (9) gifts** valued at \$435.00

In the event that the same contractor obtains both standing offers (long service awards and instant awards), the gift selections offered for the instant awards shall be different from the gift selections offered for the long service and retirement awards.

##### **4.1.1 Award**

Instant awards shall not be personalized and shall not bear official symbols of the Government of Canada. **The gifts shall be stylish articles (practical and contemporary).**

The contractor shall work with environmentally responsible partners that have credible certifications, that is, reliable, trustworthy sources, for each award given.

For each of the levels, the contractor shall create an ecological award category, i.e. a green option that includes five (5) gifts, all of which are eco-friendly products, i.e. environmentally friendly purchases that consider environmental impact and that are manufactured in socially respectful conditions, for example, under fair trade. The product is considered ecological when the environmental impact of its manufacturing is minimized from cradle to grave. The [translation] “responsibility dimension” suggests that the manufacturing of the object increases the positive impacts on society.

Therefore, this option shall make it possible to learn more about sustainable development and take concrete action to protect the environment. In this category, every gift shall include a certificate explaining where it came from, the materials used to produce it and the way in which it was produced.

The description of the articles selected in the green awards section (green option) shall use neutral language that does not refer to sex or gender that extends to all federal public servants as described in the gender-based analysis of Status of Women Canada.

For levels 1 to 3, the contractor shall provide a gift card from a merchant such as Tim Hortons, Starbucks, Second Cup or other for the purchase of coffee or any other beverage, a gift card from a Cineplex Cinema or other, a gift card from a merchant such as Indigo, Chapters or other and a gift-card for Google Play and Apple Store. For levels 4 and higher, the contractor shall offer a gift card from an electronics store such as Best Buy, Staples, the Source, etc., a gift card from a jewelry store such as Birks, People, Caroline Neron, Pandora, etc., a gift card for the purchase of gas at Petro-Canada, Shell, Esso or other, a gift card from a spa such as Amerispa or Wayspa. Note that any offer or promotion in relation to a spa shall be attributed to a single person.

#### **4.1.2 Selection package**

The contractor shall give one (1) hard copy bilingual selection package (French, English), to the person responsible for the recognition program for each department, agency or Crown corporation.

The selection package **shall** include all of the levels (1 to 9) and shall be designed in such a way as to minimize the waste, by using recycled materials. Packages **shall** include the following:

- A colour photo of the selection of gifts and gift cards for each level (1 to 9);
- An order form indicating the selection of gifts.
- A standard ring sizer, to help the recipient to determine the size of the ring, if applicable.

#### **4.1.3 Packaging**

Each gift shall be packaged in its regular commercial packaging (the manufacturer's) to ensure that it arrives at its destination in good condition. The gift shall be accompanied by a presentation bag. The packaging shall be designed in such a way as to minimize waste, by using recycled materials.

## **5. PROGRAM REVIEW**

The Instant Award Program shall be subject to annual review and evaluation, and progress assessment meetings shall take place as needed to monitor the Program's effectiveness and review the selection of gifts. Meetings shall take place at the facilities of the contractor or those of PSPC or of the OCHRO, at no additional cost to Canada.

### **5.1 Replacements in regard to the selection of gifts**

Before the contractor makes any replacement the contractor shall advise the OCHRO and PSPC by email. After the supplier obtains the initial permission for a proposed replacement, the supplier shall then provide a sample of the selection of replacement gifts, accompanied by a colour photo and a detailed description in both official languages. The sample shall be submitted within seven (7) business days following the notice of approval from the program manager (OCHRO), and the (PSPC) without additional costs for the State. Before making the replacement in the framework of the program, the contractor shall have received a written notice from OCHRO and PSPC that indicates their approval.

### **5.2 Minutes of meetings**

The contractor shall prepare and record the minutes of all of the meetings and distribute them to the Standing Offer Authority of Public Services and Procurement Canada (PSPC) and to the Program Officer (OCHRO), no later than seven (7) days after the meeting.

## **6. PROGRAM MANAGEMENT**

The contractor shall be responsible for overall management of the Instant Award Program. The contractor shall describe its management method, i.e. efficient program architecture, efficient control systems, quality assurance, reporting procedures on the completion of work, schedules, as well as activities involving sub-contractors.

### **6.1 Program manager**

The contractor shall designate a program manager who is proficient in both official languages, in writing and orally, and who has a minimum of 3 years of experience in the management of a comparable award program or a similar project. The program manager's responsibilities shall include but are not limited to the following elements: the order-taking process; the sub-contractors' ability to deliver all of the articles, if applicable; inventory management, storage and distribution networks; emergency plans; support services; customer service, returns and guarantees as well the annual, quarterly, and other on-demand production reports. The program manager shall work in close cooperation with the representative of the OCHRO and

that of the PSPC, as well as with the coordinators of the various departments, agencies or Crown corporations.

## **6.2 Progress review reports**

The contractor shall produce, maintain and submit to the Standing Offer Authority and to the Program Officer quarterly progress reports, beginning on the ninetieth (90<sup>th</sup>) day following the date of the beginning of the program, and every ninety days (90) days after that. The report shall be filed on the supplier's letterhead, and shall completely and specifically report on the progress achieved in the framework of the program, including but not limited to the following information:

- (a) a list of orders made and filled by each agency;
- (b) the number of gifts selected for each level; the description/the value/the total cost of the gifts per agency;
- (c) turnaround times;
- (d) the number of articles returned and the reasons why they were returned;
- (e) a list of current significant problems;
- (f) resolved significant problems;
- (g) the measures taken to solve unresolved problems, specifying the supplier's responsibilities.

## **6.3 Follow-up reports**

The contractor shall keep a record on each order submitted by the award coordinators. The contractor is bound to establish a numbered follow-up system that makes it possible to follow up on orders. At the very least, the information set out below shall be kept for each order and be available for the Program Officer (OCHRO) on a monthly basis:

- (a) the name of the organization that placed the order;
- (b) the order form certifying that the person who placed the order has the authority to do so and that funds are available;
- (c) the order number;
- (d) the description of the gift ordered;
- (e) the quantity ordered;
- (f) the quantity delivered;
- (g) the total cost (plus applicable taxes);
- (h) shipping or delivery costs or additional costs (express delivery)';
- (i) list of coordinators of the different participating departments, agencies or Crown corporations;
- (j) the comments;
- (k) a questionnaire on the satisfaction of the coordinators and recipients.

## **6.4 Training**

The contractor shall propose a method for training coordinators for the initiation of the online instant award program. The initial training shall be offered online with the help of a tutorial about how to place an order, to

calculate delivery fees, to access and produce reports and any other activities related to the tasks of a recognition program officer. The training shall be offered within two (2) months of the issuance of the standing offer. Any other initial training shall be offered at no additional cost to Canada.

#### **6.4.1 Manager training**

The contractor shall also offer training to the managers, which shall enable them to improve their skills in the art of giving efficient and significant recognition to their employees. This training shall be offered online through a tutorial and the managers shall be able to use it at the time and place that is most convenient to the managers during their work day. The teaching shall be dispensed in modules that are no longer than ten (10) minutes each. Each module shall address behaviours and attitudes that have been identified by recognition experts.

The training for managers shall be personalized and adapted to their needs. To do so, managers shall complete an online evaluation on their recognition skills. The result obtained shall determine the number of modules necessary to perfect their knowledge in the art of recognition.

Once the module or modules are completed, the manager shall receive an electronic certificate recognizing that the manager has completed the modules on the art of giving recognition. A report of managers who have completed the training shall automatically be sent to the national coordinators and shall also be available on request.

The contractor shall be able to propose a monitoring method to re-test the manager's knowledge six (6) months after the manager's training.

#### **6.5 Returns**

Defective or damaged gifts or gifts under warranty shall be returned to the supplier for repair or replacement, and shall be sent back to the award coordinator within five (5) business days, at no additional cost to Canada.

#### **6.6 Technology**

The contractor shall provide and manage a database software package to monitor the project and offer the necessary support. This database shall be made up of computer devices that are used for collection, storage, work and the various uses related to the Instant Award Program.

The contractor shall establish a website for the Instant Award Program. The web site shall be offered in both official languages, and be of equal quality. It shall be possible to consult it through the Explorer navigator, be accessible to people with visual or physical disabilities. The Web site shall respect the Web Content Accessibility Guidelines (WCAG) 2.0. Web accessibility means that disabled persons can perceive, understand, navigate and interact with the web.

The site shall be up and running within two (2) months following the date on which the standing offer was issued.

The web site shall provide information that included, but is not limited to, the following:

- One (1) colour photo and description of each gift and each gift card offered for each level of the Instant Award Program.
- A contact list for the different services.
- A shipping calculator.
- A dashboard that makes it possible to produce various reports: such as electronic card, tree planting, coordinator satisfaction questionnaire, amount spent per institution, etc.
- A list of coordinators that can be updated by national coordinators.
- The order form.
- The 24-hour 1-800 number and fax number.
- A tool kit on day-to-day recognition for coordinators and managers.
- Table that includes requirements for the reward levels.
- A question-and-answer section.
- A customer service section.
- A section on manager training.
- A section for electronic cards that is easily accessible with one click, which shall be instant online recognition tools. It shall be possible to use these original cards for all sorts of occasions (thank you, excellent work, anniversary, special holiday, etc.).
- A section for virtual awards like badges, trophies, stars, medals or others that any manager could award to deserving staff.

## **6.7 Client Service**

The contractor shall offer customer service in both official languages for all of the award coordinators of the different departments, agencies or Crown corporations and respond to any information requests that are submitted by the participating agencies through a 1-800 number between 9:00 a.m. and 6:00 p.m. Eastern Standard Time (EST), from Monday to Friday, as well as offer service by Internet, email and fax.

**DRAFT APPENDIX 1**

**MANDATORY AND POINT-RATED TECHNICAL EVALUATION CRITERIA**

**INSTANT AWARDS**

The offers will be evaluated in accordance with the process outlined in Part (XXX) Evaluation and Selection as well as on all mandatory criteria detailed below. The Offeror must provide supporting documentation in their proposal to demonstrate that each mandatory technical requirement has been met. To facilitate the evaluation process, it is preferable that the Offeror complete the table below to indicate where the information is in their proposal. The offers that do not meet all of the mandatory requirements will be declared non-responsive and the offer will not be considered.

<b>STAGE 1 - MANDATORY TECHNICAL EVALUATION CRITERIA</b>		
<b>Item</b>	<b>Mandatory Criteria</b>	<b>Section for Bidder use only</b> <b>Indicate the page number for reference</b>
<b>M1</b>	<p><b><u>M.1.1 Experience and Expertise of the Firm</u></b></p> <p><b>M.1.1.1</b> The Offeror must demonstrate that the firm has at least three (3) years of experience and expertise in the last five (5) years managing an Instant Awards Program and related services;</p> <p><b>M.1.1.2</b> The Offeror must have the ability to supply and deliver Gift selection items through an established national* distribution network. In order for the Bidder to demonstrate its supply and delivery capabilities, it must have a minimum of two (2) multi-year national agreements, each with an annual expenditure of \$500K, for the supply and delivery of Gift selection items for a client's recognition program, within the last five (5) years from the date of bid closing. Each agreement must have been in place for a minimum of 24 consecutive months;</p>	

	<p><b>M.1.1.3</b> To demonstrate this experience, the Offeror must provide the following information regarding each agreement:</p> <ul style="list-style-type: none"> <li>• The name of the client organization;</li> <li>• The name and telephone number of the client organization's contact;</li> <li>• The start date and end dates of the agreement, or the anticipated end date if still active;</li> <li>• The annual expenditure by the client organization on the agreement, and;</li> <li>• Summary details of the type of agreement in place which would demonstrate compliance with this requirement as described above.</li> </ul> <p>*National: the agreement provided for the supply and delivery of Gift selection items for a recognition program to a minimum of 5 provinces, territories, states or equivalent.</p>	
<p><b>M2</b></p>	<p><b>M.2.1 <u>Experience and Expertise of the Proposed Personnel</u></b></p> <p><b>M.2.1.1</b> The Offeror must demonstrate that the proposed Project Manager has at least three (3) years of experience in the last five (5) years in managing an Instant Awards Program and related services across Canada;</p> <p><b>M.2.1.2</b> The Offeror must demonstrate that the proposed Program Manager has experience in providing customer service in both of Canada's official languages. This fluency must translate in the ability to communicate orally and in writing without any help and with a minimum of errors;</p> <p><b>M.2.1.3</b> The Offeror must have experience in developing a website in both official languages for a Long Service Award Program. The website must be navigable using Internet Explorer, be accessible to the visually impaired and to people with disabilities as described in the WCAG 2.0 criteria's Guidelines (<a href="http://www.w3.org/TR/WCAG20/">http://www.w3.org/TR/WCAG20/</a>);</p> <p><b>M.2.1.4</b> The offeror must demonstrate how it will set-up an operational website no later than two (2) months after the date of issuance of the Standing Offer;</p>	

	<p><b>M.2.1.5</b> The Offeror must demonstrate that the packaging for the Instant Awards Program is a green product, as specified in Annex B – Statement of Work;</p> <p><b>M.2.1.6</b> The Offeror must provide with its offer, one (1) sample selection kit for each category (gift cards) including a “green” product, a tree certificate and E-card samples as described in Annex B – Statement of Work. All documents submitted must be in both official languages and of equal quality. Failing to meet that obligation may result in the application being rejected.</p>	
<p><b>M3</b></p>	<p><b>M.3.1 Training for Managers</b></p> <p><b>M.3.1.1</b> The Offeror must demonstrate a minimum of three (3) years of experience and expertise acquired over the last five (5) years in the development of a Managers Training Program as described in Annex B – Statement of Work.</p>	

**STAGE 2 - POINT RATED TECHNICAL EVALUATION CRITERIA:**

Only offers meeting the Mandatory Requirements - Stage 1, will be scored against the Point-rated Criteria detailed herein. Minimum points have been established for selected criterion and for the overall total score for the category. Offers must obtain the minimum number of points required or better, for each criterion, in order to be given further consideration.

In order to be considered responsive for the Instant Award Program, offers must meet all of the requirements identified as mandatory, achieve a minimum overall passing mark of **595 points (70%)** on a scale of **850 points**, and attain a minimum score of **70%** for each evaluation category (A through C) under Point-rated Criteria (Stage 2) and attain a minimum score of **70%** for Pre-award Samples (Stage 3).

By addressing each criterion directly and providing, at a minimum, the information requested, the Offeror has the possibility to maximize its potential score.

The following categories will be evaluated in **Stage 2**, based on a Point-rated System for their technical capabilities:

- A. Project Management and Methodology; (400 points)**

- B. Experience & Expertise; (300 points)
- C. Data Management and Reporting: (150 points)

**I) INSTANT AWARD PROGRAM: (Maximum: 850 points/ Minimum: 595 points)**

Offerors must obtain the minimum overall pass mark of **595 points (70%)**, on a scale of **850 points**, **AND** attain a minimum score of **70%** in each evaluation category, **(A through C) - Stage 2**, to be considered responsive.

**A) Project Management and Methodology (Maximum: 400 points/ Minimum: 280 points)**

The Offeror must provide sufficient detail to clearly demonstrate how they propose to meet the objectives/requirements and service level of the Instant Award Program as detailed in the Statement of Work at **Annex "B"**. The information provided must include, and will be evaluated in accordance with the following point rated criteria:

- 1.1 A detailed work plan outlining the methodology on how the work will be accomplished, including a list of tasks, a milestone schedule; developing a web-site exclusively for the use of the Instant Award Program; inventory and quality assurance processes; methods to meet delivery schedules; training for coordinators; training for managers; reporting methods for tracking the progress; customer/client service, e-cards, virtual trophies, reporting methods for tracking the progress; customer/client service, contact list, Q&A's section; coordinator's list, etc.  
**(Maximum: 200 points/Minimum: 140 points)**
- 1.2 A description of the infrastructure, including an organization plan, a program manager and team dedicated to the project; human and physical resources available (e.g. warehousing, security); identification of capabilities not currently in place and the plan to acquire them; problem resolution strategies and transition strategies.  
**(Maximum: 200 points/Minimum: 140 points)**

**B) Experience and Expertise (Maximum: 300 points/ Minimum: 210 points)**

The Offeror must provide detailed information on its experience and expertise as well as customer satisfaction, which will be evaluated in accordance with the following point-rated criteria:

- 1.1 Identification of a Project Manager for the Instant Award Program, including a detailed résumé; their experience in a management capacity in similar projects; level of responsibility (managerial); number of projects managed; a minimum of three (3) years of experience

is required and an in-house questionnaire on client satisfaction and or comments received from clients for each project described.  
**(Maximum: 100 points/Minimum: 70 points)**

1.2 Identification of Team Members including a detailed resume and their experience in similar projects; level of responsibility; number of projects involved, etc.  
**(Maximum: 100 points/Minimum: 70 points)**

1.3 Identification of two (2) projects similar in nature and scope to this requirement performed within the last three (3) years, including a description of the monetary value; complexity; duration; list of tasks and responsibilities of personnel; web-based; any major problems and how they were resolved.  
**(Maximum: 100 points/Minimum: 70 points)**

**C) Data Management and Reporting (Maximum: 150 points/Minimum: 105 points)**

The Offeror must provide detailed information on their technical capabilities with respect to the data base software to be used for the Instant Award Program as well as the Progress and Tracking Reports, which will be evaluated in accordance with the following point rated criteria:

1.1 A description of the data base software to be used including procedures for managing the program; designed specifically for client; accessibility to customers; help lines, secured site; etc.  
**(Maximum: 75 points/Minimum: 52.5 points)**

1.2 A description of the format to be used for the progress and tracking reports, including their accessibility to the customer; method of distribution to customer; one (1) example of the progress report and one (1) sample of the tracking report are to be provided.  
**(Maximum: 75 points/Minimum: 52.5 points)**

**DRAFT - ANNEX C**  
**STATEMENT OF REQUIREMENTS**  
**SOCIAL RECOGNITION**

**Background**

Treasury Board Secretariat (TBS) is seeking a Social Recognition solution to support its business goals and values.

This statement of requirements (SOR) outlines the tasks, services and work to be delivered by the offeror on behalf of TBS for the Social Recognition requirement and related services to be used by participating departments, agencies and Crown corporations.

The offeror shall implement a Social Recognition web site that the departments, agencies and Crown corporations of the Public Service of Canada may use to recognize the service of employees.

**Technical Requirements**

The technical requirements are as follows:

<b>Section 1 - Technical</b>	
	<b>Requirement Description</b>
1.1	<p>The Solution must provide the ability to have Canadian hosting options for Government of Canada employee data in accordance with security and privacy legislation.</p> <ul style="list-style-type: none"> <li>• To ensure Canada’s sovereign control over its data, all sensitive or protected data under government control will be stored on servers that reside in Canada. Data in transit will be appropriately encrypted.</li> </ul>
1.2	<p>The offeror’s Solution must be provided on one of the following types of Cloud Options:</p> <ul style="list-style-type: none"> <li>• Public Cloud: a Cloud Service Infrastructure intended for use by the general public that resides on the premises of the Cloud Service Provider, and may be owned/operated by an organization, private company, or a combination thereof</li> <li>• Private Cloud: a Cloud Service Infrastructure intended for exclusive use by business areas within a specific organization, that resides on or off the premises of the customer, and may be owned/operated by a third party, the organization, or a combination thereof</li> <li>• Community Cloud: a Cloud Service Infrastructure intended for exclusive use by business areas from a specific group of organizations with shared concerns, that resides on or off the premises of the customer organizations, and may be owned/operated by a third party, one or more organizations, or a combination thereof</li> <li>• Hybrid Cloud: a Cloud Service Infrastructure composed of two or more Cloud Service Infrastructures that remain discrete and independent, but have been bound as an environment through technology, portability, and interoperability</li> </ul> <p>See: <a href="https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/cloud-computing/government-canada-cloud-adoption-strategy.html#toc5-1">https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/cloud-computing/government-canada-cloud-adoption-strategy.html#toc5-1</a></p>
1.3	<p>The Solution must provide a Single Sign-On (SSO) feature:</p> <ul style="list-style-type: none"> <li>• Allow Single Sign-On (SSO) to enable employees to log in once through a central company authentication point and access the platform/software systems.</li> <li>• Once authenticated on the corporate authentication system, employees will not be prompted to enter their user name and password again.</li> </ul>

1.4	<p>The Solution must provide integration/compatibility without the need for additional, custom development for the Cloud-based platform, for the following software suites:</p> <ul style="list-style-type: none"> <li>• PeopleSoft</li> <li>• SAP</li> <li>• Microsoft Active Directory</li> <li>• GC Tools</li> </ul>
1.5	<p>The Solution must provide the ability for SaaS cloud-based platform compatible with, at a minimum:</p> <ul style="list-style-type: none"> <li>• Web             <ul style="list-style-type: none"> <li>○ Standard on Web Accessibility <a href="http://www.tbs-sct.gc.ca/ws-nw/wa-aw/index-eng.asp">http://www.tbs-sct.gc.ca/ws-nw/wa-aw/index-eng.asp</a></li> <li>○ Standard on Privacy and Web Analytics <a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26761">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26761</a></li> <li>○ Standard on Web Interoperability <a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875</a></li> <li>○ Standard on Optimizing Websites and Applications for Mobile Devices</li> </ul> </li> <li>• Mobile Devices</li> <li>• Mobile Device App (at a minimum - Blackberry, iPhone/Android)</li> <li>• Compatibility with current mobile browsers in use with GC in the absence of a mobile app</li> </ul> <p>Develop an application programming interface strategy in cooperation with TBS.  <a href="https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html#toc8-1-4">https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html#toc8-1-4</a></p> <ul style="list-style-type: none"> <li>• Application Programming Interface (APIs) are increasingly becoming the way to facilitate sharing of government data and information and, as such, are foundational building blocks that support the GC's commitment to digital services. TBS will develop an API strategy for the GC.</li> <li>• Platforms that offer an API enable organizations to integrate the solution with other enterprise applications.</li> </ul>

Section 2 - Security	
	Requirement Description
2.1	<p>The Solution must ensure and demonstrate that the infrastructure it provides is secure, reliable and of high availability.</p> <ul style="list-style-type: none"> <li>• ITSG-33 (<a href="https://www.cse-cst.gc.ca/en/publication/itsg-33">https://www.cse-cst.gc.ca/en/publication/itsg-33</a>)</li> <li>• ITSG-22 (<a href="https://www.cse-cst.gc.ca/en/publication/itsg-22">https://www.cse-cst.gc.ca/en/publication/itsg-22</a>)</li> <li>• ITSG-38 (<a href="https://www.cse-cst.gc.ca/en/publication/itsg-38">https://www.cse-cst.gc.ca/en/publication/itsg-38</a>)</li> <li>• Management of Information Technology Security (MITS) (<a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328</a>)</li> <li>• Policy on Government Security (<a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578</a>)</li> </ul>
2.2	<p>The Solution must ensure that all applicable Laws, Directives, Policies and IT Security Standards are applied.</p>
2.3	<p>The Solution must provide a regulatory compliance reporting mechanism that verifies the quality and effectiveness of its IT security services.</p>
2.4	<p>The Solution must provide that IT Security controls are implemented to protect GC and partner data.</p>
2.5	<p>The Solution must provide that information is securely stored, transmitted, or processed corresponding to its categorization.</p>
2.6	<p>The Solution must protect the integrity of the information being stored and transmitted.</p>

2.7	The Solution must ensure that all access to information is recorded in an auditable fashion to meet accountability requirements.
2.8	The Solution must ensure that all systems it implements and maintains conform to IT Security standards to support IT interoperability.
2.9	The Solution must ensure that the IT Security Services meet or exceed the security best practices of industry and other leading government agencies
2.10	The Solution must ensure that IT information is backed up, archived and disposed according to the respective IT security policies and procedures.
2.11	The Solution should provide support for users and technical operations including: <ul style="list-style-type: none"> <li>• User training</li> <li>• Technical training,</li> <li>• Technical Support – hours, location and availability to meet the needs of geographical dispersed employees</li> </ul>
2.12	The Solution must provide: <ul style="list-style-type: none"> <li>• Management of Permissions and Access Authority to provide the capability to assign permissions/access/authorizations to designated users roles</li> <li>• Audit and Traceability - provide an audit log, user traceability and track events for any user activity in the solution.</li> <li>• Restrict the access to change the system, parameters, configuration, and/or master data to authorized roles/administrators only.</li> </ul>

<b>Section 3 - Language</b>	
	<b>Requirement Description</b>
3.1	The Solution and all its components must conform to the Canadian Official Languages Act. <ul style="list-style-type: none"> <li>• Official Languages Act</li> <li>• <a href="http://laws-lois.justice.gc.ca/eng/acts/O-3.01/index.html">http://laws-lois.justice.gc.ca/eng/acts/O-3.01/index.html</a></li> </ul>
3.2	The Solution must provide the ability to be used in both Official Languages and of equal quality. <ul style="list-style-type: none"> <li>• The user can select interaction with the solution using their official language of choice.</li> <li>• The Solution must provide the user the ability to toggle between English and French without having to sign off.</li> </ul>
3.3	The Solution must ensure that all user interface components, forms, catalogues, and error messages shall be fully supported in both official languages.
3.4	The Solution must make available releases of the software and software patches in both official languages simultaneously.

<b>Section 4 - Privacy</b>	
	<b>Requirement Description</b>
4.1	The Solution must ensure that all systems and processes used to collect, process or store personal information comply with the Canadian Privacy Act and its subsidiary regulations and GC standards. <ul style="list-style-type: none"> <li>• Policy on Privacy Protection - <a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12510">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12510</a></li> <li>• Personal Information Protection and Electronic Documents Act (S.C. 2000, c. 5) <a href="https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/">https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/</a></li> </ul>

Section 5 - Accessibility	
	Requirement Description
5.1	The Solution must support a high level of Web accessibility that is applied uniformly across <a href="#">Government of Canada websites and Web applications</a> . Ensuring each <a href="#">Web page</a> meets all five <a href="#">WCAG 2.0 conformance requirements</a> Standard on Web Accessibility - <a href="http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601">http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601</a>

Section 6 - Digital	
	Requirement Description
1.	The Solution shall be compliant with the Government of Canada “Open Government” and ensure a consistent end-user experience government-wide, regardless of geographical location <ul style="list-style-type: none"> <li>• Government of Canada Strategic Plan for Information Management and Information Technology 2017 to 2021</li> <li>• <a href="https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html#toc4-1">https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html#toc4-1</a></li> </ul>

Section 7 - Features	
	Requirement Description
7.1	The Solution shall provide the ability for employees to offer recognition and feedback using a variety of methods, including: <ul style="list-style-type: none"> <li>• Recognition insignia, such as badges, stars, or points that can be granted and represent public service culture/values</li> <li>• Enable every employee to recognize anyone, anytime with a “one-click” recognition</li> <li>• Recognize anyone from the email application</li> <li>• Choose to recognize by email, audio and/or video recognition</li> <li>• Choose to “endorse” the skills of other members</li> <li>• Choose to use a “like” feature and have the ability to comment on content generated by another user</li> <li>• Choose to display the appreciation of someone else, their work, etc. (e.g. similar to a Twitter feed)</li> <li>• Have the ability to leave comments on recognition and feedback</li> <li>• Have the ability to provide a recognition leaderboard that displays employees and their points/badges/likes,</li> <li>• Have the ability to add one or more individual(s) or group(s) who will be able to see what has been sent to the recipient.</li> <li>• Have the ability to notify Managers, Teams of a variety of selected content</li> </ul>
7.2	The Solution should provide the ability to customize rewards options <ul style="list-style-type: none"> <li>• Ability to redeem rewards based on points system</li> <li>• Ability to redeem rewards as specified by the Program</li> <li>• Ability to manage points redemption</li> <li>• Ability to customize the allocation of points</li> <li>• Ability to customize rewards options</li> <li>• Ability to access an online rewards store</li> </ul>
7.3	The Solution should provide Reporting and Analytics. <ul style="list-style-type: none"> <li>• Ability to produce, manage and track standard, ad hoc and customized reports and dashboards based on authorized user or role.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to create, manage and print any report in the language requested by the user.</li> <li>• Ability to adapt reports to meet TBS needs, available electronically to administrators and managers, easily accessible and transferable into Excel or CVS.</li> <li>• Ability to create Dashboards and manage and track KPIs</li> <li>• Ability to capture regular statistics on usage rates, including:             <ul style="list-style-type: none"> <li>○ Sector/region/division/responsibility centre</li> <li>○ level of recognition</li> <li>○ Category/theme</li> <li>○ Recognition by user, business unit, team and location</li> <li>○ Nominator</li> <li>○ Rationale for nomination</li> <li>○ Name of employee(s) approving nomination</li> <li>○ Description of selected gift item</li> <li>○ Points allocation and redemption</li> <li>○ Date of nominations, approval(s), gift selection and shipping</li> <li>○ Dollar Value (if applicable)</li> </ul> </li> <li>• Ability to provide TBS with the names of the employees who, during the calendar year, received non-cash gifts and awards in excess of \$500 as well as non-cash long service/anniversary awards in excess of \$500 along with the dollar value of each non-cash gift or award received to respond to the Canada Revenue Agency (CRA) policy concerning gifts and awards.</li> </ul>
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Section 8 - Platform Management & Administration	
	Requirement Description
8.1	The Solution should provide the ability to moderate recognition, feedback and comments <ul style="list-style-type: none"> <li>• Profanity filter for recognition, feedback and comments</li> <li>• Spell check capability</li> <li>• Help function</li> </ul>
8.2	The offeror should provide support for users and technical operations including: <ul style="list-style-type: none"> <li>• User training</li> <li>• Technical training,</li> <li>• Technical Support – hours, location and availability to meet the needs of geographical dispersed employees</li> <li>• Maintenance and Releases Management processes and schedules that include all patches, upgrades, and new version releases, as well as product support for problems, bugs and known issues.</li> </ul>
8.3	The Solution should provide Professional Services: <ul style="list-style-type: none"> <li>• Services to assist with implementation, and on-going success and expansion of the organization’s engagement program.</li> </ul>
8.4	The Solution shall provide users and transaction volumes: <ul style="list-style-type: none"> <li>• Optimum number of concurrent users the solution will support.</li> </ul>
8.5	The Solution should have options to turn functionality on or off to meet the needs of small, medium and large organizations and the ability to configure additional features as their program grows.
8.6	The offeror must provide and disclose all information on third party alliances, relationships, or dependencies. <ul style="list-style-type: none"> <li>• What information will be shared with third parties?</li> <li>• Identify/List all 3<sup>rd</sup> Party companies who will be associated with and/or have access to GC employee data</li> </ul>

Section 9 - Training	
	Requirement Description
9.1	<p>The offeror must provide Training for users and administrators: Identify the levels of training offered/provided:</p> <ul style="list-style-type: none"> <li>• Is formal user training offered?</li> <li>• Do you have courses – users, administrator – are they online, video, webinars, tutorials?</li> <li>• What training material is offered/provided</li> </ul>

Section 10 - Licensing Model	
	Requirement Description
10.1	<p>The Solution must identify the type of licencing model available:</p> <ul style="list-style-type: none"> <li>• One-time License</li> <li>• Subscription</li> <li>• Enterprise-wide license</li> <li>• User Licence Agreements</li> </ul>

## REFERENCES

Document	Document Location
Web Accessibility	<a href="http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601">http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601</a> Note: Common Look and Feel 2.0 required WCAG 1 up till July 2011 for all government websites. The Jodhan vs. Attorney General of Canada ruling requires the Canadian government to update the guidelines to WCAG 2, and this was implemented as the <a href="#">Standard on Web Accessibility</a> on Aug 1, 2011.
GC Strategic Plan for IM and IT 2017-2021	<a href="https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html">https://www.canada.ca/en/treasury-board-secretariat/services/information-technology/strategic-plan-2017-2021.html</a>
ITSG-33	<a href="https://www.cse-cst.gc.ca/en/publication/itsg-33">https://www.cse-cst.gc.ca/en/publication/itsg-33</a>
ITSG-22	<a href="https://www.cse-cst.gc.ca/en/publication/itsg-22">https://www.cse-cst.gc.ca/en/publication/itsg-22</a>
ITSG-38	<a href="https://www.cse-cst.gc.ca/en/publication/itsg-38">https://www.cse-cst.gc.ca/en/publication/itsg-38</a>
Management of Information Technology Security (MITS)	<a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328</a>
Policy on Government Security	<a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578</a>
Policy Framework for Information and Technology	<a href="http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12452">http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12452</a>
Directive on Departmental Security Management	<a href="https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16579">https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16579</a>
CSE ITSP.40.111 Cryptographic Algorithms for UNCLASSIFIED, PROTECTED A and PROTECTED B Information	<a href="https://www.cse-cst.gc.ca/en/node/1831/html/26515">https://www.cse-cst.gc.ca/en/node/1831/html/26515</a>
CSE ITSP.40.062 Guidance on Securely Configuring Network Protocols	<a href="https://www.cse-cst.gc.ca/en/node/1830/html/26507">https://www.cse-cst.gc.ca/en/node/1830/html/26507</a>

## **PART 6 – QUESTIONS TO INDUSTRY**

### **GENERAL QUESTIONS**

#### **Question 1**

What are the advantages and disadvantages of the following options?

**Question 1-A:** Option 1 - three separate requirements under three procurement tools, i.e. one standing offer for Long Service and Retirement Awards, one standing offer for Instant Awards and one standing offer for Social Recognition.

Answer 1-A



**Question 1-B:** Option 2 - combining the Long Service and Retirement Awards, and the Instant Awards under the same procurement tool, i.e. one standing offer for both requirements and one standing offer for Social Recognition.

Answer 1-B



**Question 1-C:** Option 3 - combining all three requirements under the same procurement tool, i.e. one standing offer for the Long Service and Retirement Awards, the Instant Awards and Social Recognition.

Answer 1-C



#### **Question 2**

Canada's proposed bid/offer financial evaluation strategy is to request manufacturer's suggested retail prices (MSRPs) for the Long Service and Retirement Awards, and Instant Awards requirements. The highest MSRP would be considered as the one offering the best value.

Answer 2

Please provide comments on our proposed strategy.



#### **Question 3**

What bid/offer financial evaluation strategies would you propose should Canada proceed with option 1 detailed in question 1-A above in order to obtain the best price (best quality/price ratio)?

Answer 3

Please provide your proposed strategy.



**Question 4**

What bid/offer financial evaluation strategies would you propose should Canada proceed with option 2 detailed in question 1-B above in order to obtain the best price (best quality/price ratio)?

Answer 4

Please provide your proposed strategy.

**Question 5**

What bid/offer financial evaluation strategies would you propose should Canada proceed with option 3 detailed in question 1-C above in order to obtain the best price (best quality/price ratio)?

Answer 5

Please provide your proposed strategy.

**Question 6**

What basis of payment would you propose should Canada proceed with option 1 detailed in question 1-A above?

Answer 6

Please provide your proposed basis of payment.

**Question 7**

What basis of payment would you propose should Canada proceed with option 2 detailed in question 1-B above?

Answer 7

Please provide your proposed basis of payment.

**Question 8**

What basis of payment would you propose should Canada proceed with option 3 detailed in question 1-C above?

Answer 8

Please provide your proposed basis of payment.



**QUESTIONS ON DRAFT ANNEX A – STATEMENT OF WORK OF LONG SERVICE AND RETIREMENT AWARDS**

**Question 1**

Would you be able to propose another solution to the tree planting requirement?

Answer 1

Please make a selection

If yes, please specify your comments/concerns.



**Question 1-A**

Are there any other alternative green/ecological solutions available?

Answer 1-A

Please make a selection

If yes, please specify and provide detailed information on the proposed alternative solution.



**Question 2**

The delivery time for the implementation of a web site for this requirement is now two months. However, would you be able to implement the solution in less than two months?

Answer 2

Please make a selection

If not, please specify the aspects that would not allow you to offer the solution in less than two months.



**Question 3**

Do you anticipate any issues regarding the compliance to any of the technical requirements of the Long Service and Retirement Awards solution?

Answer 3

Please make a selection

If yes, please provide detailed information related to the issue(s).



## **QUESTIONS ON DRAFT ANNEX B – STATEMENT OF WORK OF INSTANT AWARDS**

### **Question 1**

Can the Instant Award website have a feature allowing participants to earn or attribute points for positive actions? Reward points could be accumulated or redeemed for items offered in the program's rewards marketplace.

Answer 1

Please make a selection

If the feature cannot be included, please propose alternative solutions.



### **Question 2**

Does your website offer additional or alternative features to those specified under paragraph 6.6 Technology of the SOW?

Answer 2

Please make a selection

If yes, please provide details on the additional or alternative features and explain how they could be beneficial to Canada.



### **Question 3**

Would you have any comments/concerns related to the gift cards requirement?

Answer 3

Please make a selection

If yes, please specify your comments/concerns and propose any alternative solutions.



### **Question 4**

The delivery time for the implementation of a web site for this requirement is now two months. However, would you be able to implement the solution in less than two months?

Answer 4

Please make a selection

If not, please specify the aspects that would not allow you to offer the solution in less than two months.



**Question 5**

Do you anticipate any issues regarding the compliance to any of the technical requirements of the Instant Awards solution?

Answer 5

Please make a selection

If yes, please provide detailed information related to the issue(s).



**QUESTIONS ON DRAFT ANNEX C – STATEMENT OF REQUIREMENT OF SOCIAL RECOGNITION**

**Question 1**

Does your solution meet the requirement of Section 1 – Technical Requirement?

Answer 1

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 2**

Does your solution meet the requirement of Section 2 – Security Requirement?

Answer 2

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 3**

Does your solution meet the requirement of Section 3 – Language Requirement?

Answer 3

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 4**

Does your solution meet the requirement of Section 4 – Privacy Requirement?

Answer 4

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.

**Question 5**

Does your solution meet the requirement of Section 5 – Accessibility Requirement?

Answer 5

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.

**Question 6**

Does your solution meet the requirement of Section 6 – Digital Requirement?

Answer 6

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.

**Question 7**

Does your solution meet the requirement of Section 7 – Features?

Answer 7

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.

**Question 8**

Does your solution meet the requirement of Section 8 – Platform Management & Administration Requirement?

Answer 8

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 9**

Does your solution meet the requirement of Section 9 – Training Requirement?

Answer 9

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 10**

Does your solution meet the requirement of Section 10 – Licensing Model Requirement?

Answer 10

Please make a selection

If not, please specify the aspect you do not comply with the requirement and please propose any other solutions.



**Question 11**

Do you have any clients with 150 - 200K employees or more?

Answer 11

Please make a selection

If yes, please specify how many and provide additional information related to the issue.



**Question 12**

Are any of your clients from a public and non-profit organization?

Answer 12

Please make a selection

If yes, please provide additional information related to this issue.



**Question 13**

Do you have the capacity to serve geographically dispersed sites and have a robust bandwidth management strategy for heavy usage?

Answer 13

Please make a selection

If yes, please provide additional information related to this issue.

**Question 14**

Do you currently offer a robust and synchronized English/French solution to one of your clients?

Answer 14

Please make a selection

If yes, please provide additional information related to the issues.

**Question 15**

Do you have or share contractual obligations with third party companies or associations? For example, you are the supplier of the Social Recognition solution but you have third party contracts for delivery of rewards/gifts (trophies, jewelry, electronics, art etc.)

Answer 15

Please make a selection

If yes, how many third party companies or associations do you have or share contractual obligation with?

**Question 16**

Do you anticipate any other issues regarding the compliance to any of the technical requirements of the Social Recognition solution?

Answer 16

Please make a selection

If yes, please provide detailed information related to the issues.



**LONG SERVICE AND RETIREMENT AWARDS PROGRAM - NUMBER OF AWARDS PER YEARS OF SERVICE AND RETIREMENT**

FROM JULY 2015 TO MARCH 2018

YEAR	YEARS OF SERVICE									
	5	10	15	20	25	30	35	40	45	50
2015*	240	1142	3856	763	2925	942	1474	123	44	14
2016	508	2258	7697	1771	7504	2326	3563	263	109	31
2017	374	2124	7319	1980	5742	2139	2365	220	77	23
2018**	157	493	2102	667	1812	676	854	73	42	19

YEAR	YEARS OF RETIREMENT		
	1 to 15	16 to 29	30 +
2015*	197	166	442
2016	517	807	1886
2017	529	843	1927
2018**	133	229	474

\* Information is provided from July to December 2015

\*\* Information is provided from January to March 2018

## INSTANT AWARDS PROGRAM - NUMBER OF AWARDS PER LEVEL

FROM JULY 2015 TO MARCH 2018

YEAR	LEVELS								
	1	2	3	4	5	6	7	8	9
2015*	1100	1225	1809	1501	737	478	337	68	92
2016	3144	2717	4189	4169	1934	1456	913	293	242
2017	3329	2259	3733	4383	2044	1709	946	312	236
2018**	1463	861	1384	1510	701	490	368	107	80

\* Information is provided from July to December 2015

\*\* Information is provided from January to March 2018