

**RETURN BIDS TO:**

**Employment and Social Development  
Canada (ESDC)**

Attention: Linda Handregan  
[nc-solicitations-gd@hrsdc-rhdcc.gc.ca](mailto:nc-solicitations-gd@hrsdc-rhdcc.gc.ca)

**REQUEST FOR PROPOSAL**

**Proposal To: Employment and Social  
Development Canada**

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

**Instructions : See Herein**

**Vendor/Firm Name and address**

<b>Title: Event Management Services for the Red Seal Program.</b>		
<b>Solicitation No.</b> 100011802-01	<b>Date</b> February 5, 2019	
<b>File No. – N° de dossier</b>		
<b><u>Solicitation Closes</u></b> 18 March 2019 At 02:00 PM / 14 h		<b>Time Zone</b> Eastern Standard Time or EST
<b>Address Inquiries to :</b> <a href="mailto:nc-solicitations-gd@hrsdc-rhdcc.gc.ca">nc-solicitations-gd@hrsdc-rhdcc.gc.ca</a> Size limit – 13MB		
<b>Destination</b> See Herein		

<b>Vendor/firm Name and address :</b>	
<b>Facsimile No.</b>	
<b>Telephone No.</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm (type or print)</b>	
<b>Signature</b>	<b>Date</b>

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**TITLE: Event Management for the Red Seal Program**

**PART 1 - INFORMATION AND INSTRUCTIONS**

**1. Security Requirement**

There is a security requirement associated with the requirement. For additional information, consult Part 1 - Information and Instructions, clause 7.4, Security Requirement, and Part 2 - Resulting Contract Clauses.

**2. Statement of Work**

See Annex "A".

**3. Standard Instructions, Clauses and Conditions**

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

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

The 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the exception of the following:

1. Replace references to 'Public Works and Government Services Canada' with 'Employment and Social Development Canada';
2. Delete Section 02, Procurement Business Number, in its entirety;
3. Revise Subsection 2d. of Section 05, Submission of Bids, to read:  
*"send its bid only to the e-mail address specified on Page 1".*
4. Subsection 5.4 of Section 05 is amended as follows:  
Delete: sixty (60) days  
Insert: ninety calendar (90) days
5. Delete Subsections 1a. and 1b. of Section 12, Rejection of Bid, in their entirety.
6. Delete Subsection 2. of Section 20, Further Information, in its entirety.

**4. Submission of Bids**

Bids must be received at the email address: [nc-solicitations-gd@hrsdc-rhdcc.gc.ca](mailto:nc-solicitations-gd@hrsdc-rhdcc.gc.ca), by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails **do not exceed 13MB** to avoid problems with transmission.

Canada requests that bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in separately bound sections and in three separate files, when in soft copy, as follows:

Section I: Technical Bid 1 soft copy via e-mail

Section II: Financial Bid 1 soft copy via e-mail

Section III: Certifications 1 soft copy via email

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

## **5. Mandatory Certifications Required Precedent to Contract Award**

The certification(s) listed below should be completed and submitted with the bid but may be submitted afterwards. If any of the(se) required certification(s) is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

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

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

### **5.1 Declaration of Convicted Offences**

If requested by the Contracting Authority, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide a completed [Declaration Form](http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to be given further consideration in the procurement process.

#### **Integrity Provisions – List of Names**

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

## 5.2 Former Public Servant Certification

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

### Definitions

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
- e. "lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.
- f. "pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c.C-17, the [Defence Services Pension Continuation Act](#), 1970, c.D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c.R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c.R-11, the [Members of Parliament Retiring Allowances Act](#), R.S., 1985, c.M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c.C-8.

### Former Public Servant in Receipt of a Pension

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

\* Bidder (For greater clarity, the "Bidder" means the vendor legal entity [e.g. not a resource of the vendor legal entity]).

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

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

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

### **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

### **5.3 Status and Availability of Resources**

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

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

## 5.4 Education and Experience

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

## 5.5 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](#)" list available from [Human Resources and Social Development Canada \(ESDC\) - Labour's](#) website

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed [Federal Contractors Program Employment Equity Certification](#) before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

## 6. Enquiries - Bid Solicitation

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

## 7. Evaluation Procedures

Bids received will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria specified below:

### 7.1 Technical Evaluation

All bids must be completed in full and provide all of the information requested in the bid solicitation to enable full and complete evaluation. All mandatory technical criteria are identified specifically with the words "shall", "must", or "will".

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

### 7.2 Financial Evaluation

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

The financial bid MUST submit prices as requested in the Pricing Schedule at **ATTACHMENT 1 TO PART 1**. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.

### **7.3 Basis of Selection - Highest Combined Rating of Technical and Price**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum points overall for the technical evaluation criteria which are subject to point rating.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **50%** for each of the technical merit and **50%** for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **50%**.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of **50%**.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
8. Tie Breaker: When two or more responsive proposals achieve the identical score, the proposal with the highest score in the Rated Criteria will be will be recommended for contract award.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 50/50 ratio of technical merit and price, respectively. The total available points for technical score equal 135 and for price, 45 points, based on the lowest evaluated price of \$45,000.



**Basis of Selection - Highest Combined Rating Technical Merit (50%) and Price (50%)**

	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>	
<b>Overall Technical Score</b>	125/135	108/135	115/135	
<b>Bid Evaluated Price</b>	\$55,000.00	\$50,000.00	\$45,000.00	
<b>Calculations</b>	<b>Technical Merit Score</b>	125/135 x 50 = 46.30	108/135 x 50 = 40.00	115/135 x 50 = 42.59
	<b>Pricing Score</b>	45/55 x 50 = 40.91	45/50 x 50 = 45.00	45/45 x 50 = 50.00
<b>Combined Rating</b>	87.21	85.00	92.59	
<b>Overall Rating</b>	2nd	3rd	1st	

**7.4 Security Requirement**

1. At the date of bid closing, the following conditions must be met:
  - (a) the Bidder must hold a valid organization security clearance as indicated in Part 2 - Resulting Contract Clauses;
  - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 2 - Resulting Contract Clauses;
  - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.
3. For additional information on security requirements, bidders should refer to the [Canadian Industrial Security Directorate \(CISD\), Industrial Security Program](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

**8. Applicable Laws**

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

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

**9. Debriefings**

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

## ATTACHMENT 1 TO PART 1 Pricing Schedule

The bidder must complete this pricing schedule and include it in its Financial Bid.

Any estimated level of services specified in this pricing schedule is provided for bid evaluation price determination purposes only. Levels of efforts are provided as estimates only, and must not be construed as a commitment by ESDC to respect those estimates in any resulting contract.

### Professional fees<sup>1</sup> only – Initial Contract Period (six months starting from date of award)

Name of Workshop	Number of Events	Firm Price per Event (\$)	TOTAL
National Standards	2	\$ _____	\$ _____
Item Bank	2	\$ _____	\$ _____
Item Bank Editing	2	\$ _____	\$ _____
Item Bank Translation	4	\$ _____	\$ _____
<b>Total Professional fees (Initial Contract Period)</b>			\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

### Professional fees<sup>1</sup> only – Option Period 1

Name of Workshop	Number of Events	Firm Price per Event (\$)	TOTAL
National Standards	3	\$ _____	\$ _____
Item Bank	3	\$ _____	\$ _____
Item Bank Editing	3	\$ _____	\$ _____
Item Bank Translation	1	\$ _____	\$ _____
<b>Total Professional fees (Option Period 1)</b>			\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

### Professional fees<sup>1</sup> only – Option Period 2

Name of Workshop	Number of Events	Firm Price per Event (\$)	TOTAL
National Standards	3	\$ _____	\$ _____

<b>Item Bank</b>	3	\$ _____	\$ _____
<b>Item Bank Editing</b>	3	\$ _____	\$ _____
<b>Item Bank Translation</b>	1	\$ _____	\$ _____
<b>Total Professional fees (Option Period 2)</b>			\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

**Professional fees<sup>1</sup> only – Option Period 3**

<b>Name of Workshop</b>	<b>Number of Events</b>	<b>Firm Price per Event (\$)</b>	<b>TOTAL</b>
<b>National Standards</b>	2	\$ _____	\$ _____
<b>Item Bank</b>	2	\$ _____	\$ _____
<b>Item Bank Editing</b>	2	\$ _____	\$ _____
<b>Item Bank Translation</b>	4	\$ _____	\$ _____
<b>Total Professional fees (Option Period 3)</b>			\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

<b>A) TOTAL PROFESSIONAL FEES (Initial Contract Period and Option Periods)</b>	\$ _____
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**Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Initial Contract Period**

<b>Direct Expenses Associated with the Events</b>	<b>Fixed Mark-up<sup>3</sup></b>	<b>Total (for evaluation purposes only)</b>
<b>Travel and Living Expenses: \$198,000 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$40,000 Item Bank: \$45,000 Item Bank Editing: \$5,000 Item Bank Translation: \$4,500	_____ %	\$ _____
<b>Other Direct Expenses: \$145,680 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$31,300 Item Bank: \$26,690 Item Bank Editing: \$5,150	_____ %	\$ _____

Item Bank Translation: \$4,850		
<b>Total (Initial Contract Period)</b>		<b>\$ _____</b>

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 1

<b>Direct Expenses Associated with the Events</b>	<b>Fixed Mark-up<sup>3</sup></b>	<b>Total (for evaluation purposes only)</b>
<b>Travel and Living Expenses: \$274,500 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$40,000 Item Bank: \$45,000 Editing: \$5,000 Translation: \$4,500	_____ %	<b>\$ _____</b>
<b>Other Direct Expenses: \$194,270 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$31,300 Item Bank: \$26,690 Editing: \$5,150 Translation: \$4,850	_____ %	<b>\$ _____</b>
<b>Total (Option Period 1)</b>		<b>\$ _____</b>

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 2

Direct Expenses Associated with the Events	Fixed Mark-up <sup>3</sup>	Total (for evaluation purposes only)
<b>Travel and Living Expenses: \$198,000 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$40,000 Item Bank: \$45,000 Item Bank Editing: \$5,000 Item Bank Translation: \$4,500	_____ %	\$ _____
<b>Other Direct Expenses: \$145,680 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$31,300 Item Bank: \$26,690 Item Bank Editing: \$5,150 Item Bank Translation: \$4,850	_____ %	\$ _____
<b>Total (Initial Contract Period 2)</b>		\$ _____

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 3

Direct Expenses Associated with the Events	Fixed Mark-up <sup>3</sup>	Total (for evaluation purposes only)
<b>Travel and Living Expenses: \$274,500 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$40,000 Item Bank: \$45,000 Editing: \$5,000 Translation: \$4,500	_____ %	\$ _____
<b>Other Direct Expenses: \$194,270 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$31,300 Item Bank: \$26,690 Editing: \$5,150 Translation: \$4,850	_____ %	\$ _____

<b>Total</b> (Option Period 3)		\$ _____
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<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

<b>For evaluation purposes only</b>	
<b>B) TOTAL MARK-UP ON DIRECT EXPENSES ASSOCIATED WITH THE EVENTS</b> (Initial Contract Period and Option Periods)	\$ _____

	<b>TOTAL BID EVALUATION PRICE</b>
<b>A + B</b>	\$ _____

## PART 2 - RESULTING CONTRACT CLAUSES

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

1. Applicable Laws
2. Priority of Documents
3. Statement of Work
4. Standard Clauses and Conditions
5. Security Requirement
6. Term of Contract
7. Authorities
8. Payment
9. Method of Payment
10. Invoice Submission
11. Foreign Nationals (Canadian Contractor)
12. Proactive Disclosure of Contracts with Former Public Servants (*if applicable*)

### List of Annexes:

Annex "A"	Statement of Work
Annex "B"	Official Red Seal Trade Names
Annex "C"	Tentative Workshop Schedule
Annex "D"	Specific Workshop Requirements
Annex "E"	Eligible Expenses for Workshops
Annex "F"	Evaluation Criteria (Mandatory and Technical)
Annex "G"	Federal Contractors Program for Employment Equity – Certification
Annex "H"	Security Requirements Check List

### 1. Applicable Laws

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

### 2. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the General Conditions 2029 - Goods or Services (Low Dollar Value (2016-04-04));
- (c) Annex "A" Statement of Work
- (d) Annex "B" Official Red Seal Trade Names
- (e) Annex "C" Tentative Workshop Schedule
- (f) Annex "D" Specific Workshop Requirements
- (g) Annex "E" Eligible Expenses for Workshops
- (h) Annex "F" Evaluation Criteria (Mandatory and Technical)
- (i) Annex "G" Federal Contractors Program for Employment Equity – Certification
- (j) Annex "H" Security Requirements Check List
- (k) the Contractor's bid dated \_\_\_\_\_, (to be provided upon contract award)

### 3. Statement of Work

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

### 4. Standard Clauses and Conditions

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

Whenever 'Public Works and Government Services Canada' appears in any of the standard clauses or the General or Supplemental Conditions replace with "Employment and Social Development Canada".

#### 4.1 General Conditions

2029 (2016-04-04) General Conditions - Goods or Services (Low Dollar Value), apply to and form part of the Contract, with the following exceptions:

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 06, sub-section 2.a
- 4.1.2 Delete sub-sections 08
- 4.1.3 Delete sub-sections 09
- 4.1.4 Delete sub-sections 10

### 5. Security Requirement

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), with approved Document Safeguarding at the level of **protected B**, issued by the Canadian Industrial Security Directorate, Public Services and Procurement Canada.
2. The Contractor/Offeror personnel requiring access to protected information, assets or work site(s) must EACH hold a valid **reliability status**, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC).
3. The Contractor must not utilize its Information Technology systems to electronically process, produce or store protected information until the CISD/PSPC has issued written approval. After approval has been granted or approved, these tasks may be performed up to the level of **protected B**.
4. Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PSPC.
5. The Contractor/Offeror must comply with the provisions of the:
  - a. Security Requirements Check List and security guide (if applicable), attached at Annex "H";
  - b. *Industrial Security Manual* (Latest Edition).

### 6. Period of the Contract

The period of the Contract is from date of contract award for a period of 6 months.



## 6.1 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional six (6) month periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

## 7. Authorities

### 7.1 Contracting Authority

The Contracting Authority for the Contract is: (will be provided at time of contract award)

Name:

Title:

Organization:

Address:

Telephone:

Facsimile:

E-mail address:

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

### 7.2 Project Authority

The Project Authority for the Contract is: (will be provided at time of contract award)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_\_

Facsimile: \_\_\_\_-\_\_\_\_-\_\_\_\_\_

E-mail address: \_\_\_\_\_

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

### 7.3 Contractor's Representative

The Contractor's Representative for the Contract is: (will be provided at time of contract award)

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
 E-mail address: \_\_\_\_\_

**8. Payment**

**8.1 Basis of Payment – Firm Unit Price(s) and Fixed Mark-up**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the firm unit price(s) listed in the table below. Customs duties are included, and Applicable Taxes are extra.

**Professional fees<sup>1</sup> only – Initial Contract Period (six months starting from date of award)**

Name of Workshop	Number of Events	Firm Price per Event (\$)
National Standards	2	\$ _____
Item Bank	2	\$ _____
Item Bank Editing	2	\$ _____
Item Bank Translation	4	\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

**Professional fees<sup>1</sup> only – Option Period 1**

Name of Workshop	Number of Events	Firm Price per Event (\$)
National Standards	3	\$ _____
Item Bank	3	\$ _____
Item Bank Editing	3	\$ _____
Item Bank Translation	1	\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

**Professional fees<sup>1</sup> only – Option Period 2**

Name of Workshop	Number of Events	Firm Price per Event (\$)
National Standards	3	\$ _____
Item Bank	3	\$ _____

<b>Item Bank Editing</b>	3	\$ _____
<b>Item Bank Translation</b>	1	\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

**Professional fees<sup>1</sup> only – Option Period 3**

<b>Name of Workshop</b>	<b>Number of Events</b>	<b>Firm Price per Event (\$)</b>
<b>National Standards</b>	2	\$ _____
<b>Item Bank</b>	2	\$ _____
<b>Item Bank Editing</b>	2	\$ _____
<b>Item Bank Translation</b>	4	\$ _____

<sup>1</sup> Professional fees must include any administrative cost related to the event, such as banking fees, photocopies, postal fees and phone calls.

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

**Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Initial Contract Period**

<b>Direct Expenses Associated with the Events</b>	<b>Fixed Mark-up<sup>3</sup></b>
<p><b>Travel and Living Expenses: \$198,000 (estimated)</b></p> <p><b>Estimated amount per workshop</b>  National standard: \$40,000  Item Bank: \$45,000  Item Bank Editing: \$5,000  Item Bank Translation: \$4,500</p>	_____ %
<p><b>Other Direct Expenses: \$145,680 (estimated)</b></p> <p><b>Estimated amount per workshop</b>  National standard: \$31,300  Item Bank: \$26,690  Item Bank Editing: \$5,150  Item Bank Translation: \$4,850</p>	_____ %

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 1

Direct Expenses Associated with the Events	Fixed Mark-up <sup>3</sup>
<p><b>Travel and Living Expenses: \$274,500 (estimated)</b></p> <p><b>Estimated amount per workshop</b>                      National standard: \$40,000                      Item Bank: \$45,000                      Editing: \$5,000                      Translation: \$4,500</p>	_____ %
<p><b>Other Direct Expenses: \$194,270 (estimated)</b></p> <p><b>Estimated amount per workshop</b>                      National standard: \$31,300                      Item Bank: \$26,690                      Editing: \$5,150                      Translation: \$4,850</p>	_____ %

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 2

Direct Expenses Associated with the Events	Fixed Mark-up <sup>3</sup>
<p><b>Travel and Living Expenses: \$198,000 (estimated)</b></p> <p><b>Estimated amount per worksho</b>                      National standard: \$40,000                      Item Bank: \$45,000                      Item Bank Editing: \$5,000                      Item Bank Translation: \$4,500</p>	_____ %
<p><b>Other Direct Expenses: \$145,680 (estimated)</b></p> <p><b>Estimated amount per workshop</b>                      National standard: \$31,300                      Item Bank: \$26,690                      Item Bank Editing: \$5,150                      Item Bank Translation: \$4,850</p>	_____ %

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;

- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

### Mark-up on Direct Expenses<sup>2</sup> associated with the Events – Option Period 3

Direct Expenses Associated with the Events	Fixed Mark-up <sup>3</sup>
<b>Travel and Living Expenses: \$274,500 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$40,000 Item Bank: \$45,000 Editing: \$5,000 Translation: \$4,500	_____ %
<b>Other Direct Expenses: \$194,270 (estimated)</b>  <b>Estimated amount per workshop</b> National standard: \$31,300 Item Bank: \$26,690 Editing: \$5,150 Translation: \$4,850	_____ %
<b>Total (Option Period)</b>	

<sup>2</sup> The following are considered **Direct Expenses**:

- Travel and living expenses (e.g. airfares, accommodations, meals, taxi fares, shuttle fares, vehicle allowance, parking);
- Workshop participants' eligible expenses (see Annex E) pre-approved by the Project Authority supported by appropriate receipts;
- Other direct expenses associated with the events (e.g. flight reservation fees, participants' professional fees, boardroom, catering, audio-visual equipment, printing of National Standards).

<sup>3</sup> Not to exceed 5%

#### 8.1.1 Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the Treasury Board directive entitled *Special Travel Authorities*, and the National Joint Council *Travel Directive*.

All travel must have the prior authorization of the Project Authority (as per the Treasury Board Directive on Travel, Hospitality, Conference and Event Expenditures [<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228&section=text#cha6>]). All payments are subject to government audit.

**Estimated Cost**                    \$ \_\_\_\_\_

### 8.1.2 Other Direct Expenses

The Contractor will be reimbursed for authorized expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit. All reimbursable expenses must have the prior authorization of the Project Authority. All payments are subject to government audit.

**Estimated Cost**      \$ \_\_\_\_\_

### 8.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ \_\_\_\_\_. Customs duties are included and Applicable Taxes are extra.
  
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,whichever comes first.
  
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

## 9. Method of Payment

### 9.1 One payment after completion of each event

Canada will pay the Contractor after completion of each event in accordance with the payment provisions of the Contract if:

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

## 10. Invoice Submission

1. Invoices must be submitted in the Contractor's name. Two (2) invoices per workshop will be accepted. First invoice should be for flights (and mark-up) only and the second invoice should include the participants' expense claim forms, the workshop expenses such as catering, accommodation and printing, and meeting planner professional fees and markup.

2. Invoices must show:

- a. the date, the name and address of the client department, contract number, the name of the event (trade name and type of workshop), workshop date, the expense for each different category of expenses, GST number, Procurement Business Number (PBN), if applicable, and financial code(s);
- b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
- c. deduction for holdback, if applicable;
- d. the extension of the totals, if applicable.

3. The invoice must include:

- a. All calculations of the expenses in an Excel format (template to be provided by ESDC);
  - b. A participant list – the list must be detailed and include the following: first and last name of participants, role, province/territory, full details/comments for unusual expense claim. List may also include comments from ESDC Advisor, Travel Agent/Meeting Planner as well as any other comments;
  - c. Attach copies of required receipts with the participants claim;
  - d. Attached the letter confirming instructor's eligibility to receive the professional fee for each day of the workshop with the instructor's claim if required.
4. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
5. By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

#### 10.1. T1204 Information Reporting by Contractor

1. Pursuant to paragraph 221 (1)(d) of the [Income Tax Act](#), R.S. 1985, c.1 (5<sup>th</sup> Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.

#### 11. Foreign Nationals (Canadian Contractor)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Contract, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

**12. Proactive Disclosure of Contracts with Former Public Servants (if applicable)**

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

**13. Certifications**

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.



## **Annex “A” Statement of Work**

### **1 PROJECT TITLE**

Event Management Services for the Red Seal Program.

### **2 INTRODUCTION**

The Interprovincial Standards Red Seal Program is the Canadian standard of excellence for skilled trades. It sets common standards to assess the skills of tradespersons across Canada. Tradespersons who meet the Red Seal standard receive a Red Seal endorsement on their provincial/territorial trade certificates.

The Red Seal Program represents 56 skilled trades (see Annex B for a list of trades) and a substantial portion of the country’s trades workforce. Each of the provinces and territories in Canada has the legislated authority to develop and deliver their own unique apprenticeship training programs for individuals working in the skilled trades. The Red Seal Program harmonizes provincial/territorial processes and requirements for skilled trades training certification and standards; develops and maintains interprovincial standards for Red Seal trades; facilitates collaboration with industry to build a skilled workforce; and increases the mobility of skilled tradespersons in Canada.

For more information on the Red Seal Program, visit [www.red-seal.ca](http://www.red-seal.ca).

### **3 BACKGROUND**

Employment and Social Development Canada (ESDC) provides a support function to the Red Seal Program which includes organizing and facilitating workshops with Subject Matter Experts (SMEs) and Trade Instructors.

The workshops develop various products related to the Red Seal Program, such as the following:

#### **3.1 National Standards:**

These are documents which outline all of the tasks performed by a competent journey person in a given Red Seal trade. The outcome of a standards workshop is a draft document, which, after validation by the provinces and territories, becomes the base document for training and examination development for that trade.

#### **3.2 Item Banks:**

These are banks of trade-related multiple choice questions developed to evaluate a tradesperson's competence in the tasks of the trade. These questions are developed by SMEs and Trade Instructors during a workshop.

### **3.3 Item Bank Editing Workshops:**

Following the Item Bank workshop, an editing workshop is organized to review the questions and to ensure that they are written according to pre-established Red Seal exam development procedures. SMEs from the province where the workshop is held are invited to take part in this activity.

### **3.4 Item Bank Translation workshops:**

The translation workshop is to review and comment on the translation of the questions. Bilingual trade experts review the terminology of the French questions to ensure that the translation reflects the original questions.

## **4 SCOPE OF WORK**

The contractor will be required to provide Event Management services for Red Seal workshops including services for additional activities not specified in this contract. The tentative development workshop schedule for the first year of this contract can be found in Annex C.

Outlined below are the generic requirements for the Red Seal workshops. Please see Annex D for specific requirements for each type of workshop. Event management personnel will not be required on-site for any of the workshops.

**Note:** Workshop requirements or duration may change, and rescheduling or cancellation in advance of the workshop is possible.

### **4.1 Venues:**

- The contractor will be required to conduct a competitive bidding process for a workshop venue. At a minimum, three (3) venues must be invited to submit a bid. All bids must be presented in a summary table. A list of venues will be provided by the Project Authority (or delegate) to the contractor.

It is the contractor's responsibility to secure the most competitive bid for the workshop venue based on:

- For national standard and item bank workshops:
  - All venues must quote rates for a boardroom, guest rooms, and hospitality (food and beverage), as well as provide other details/information required in order to select an appropriate venue for the workshop (such as breakfast included);
  - All venues must offer two (2) complimentary coffee/tea breaks per day;
  - All meeting rooms must have high-speed internet access, preferably both wireless and hard wire;
  - The venue must be centrally located with accommodations suitable for a week-long stay (preferably with suite guest rooms).

- For editing workshops:
  - Depending on the location of the workshop, some venues must quote rates for a meeting room, guest rooms, and hospitality (food and beverage), others only for guest rooms. Hospitality quotes from external sources may also be required.
  - The venue must be centrally located with accommodations suitable for a week-long stay.
- For translation workshops:
  - Workshops will be held in ESDC offices (140 Promenade du Portage, Gatineau), therefore, only rates for guest rooms will be required.
  - The hotel (guest rooms) must be located within walking distance of the ESDC offices with accommodations suitable for a week-long stay.
- For all selected venues, the contractor will negotiate and enter into contract with the selected venue for guest rooms, meeting room, hospitality (food and beverage requirements), audiovisual equipment and parking, as required.

**NOTE:** The suitability of the facility for each workshop/meeting may need to be confirmed by the Project Authority prior to booking it. A tour of the facilities may be performed by the Project Authority.

#### **4.2 Hospitality:**

- Cost of all hospitality expenses (including meals, breaks, gratuities and taxes) must fall within Treasury Board Travel Directive (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>) and not exceed preapproved amounts for each event. The Project Authority (or delegate) will provide the contractor the approved amounts prior to each workshop; and
- Typically, workshops have food and beverages provided at morning and afternoon health breaks.

**NOTE:** No hospitality is offered at workshops held in ESDC offices.

#### **4.3 Attendees:**

##### **4.3.1 For national standard and item bank workshops:**

- SMEs from each province/territory (P/T) are invited to participate in workshops; however, as every P/T may not participate in the workshop, the actual number of attendees can vary;
- Trade instructors may be invited to attend certain workshops;
- Other attendees may include: workshop host (P/T employee), facilitators (P/T employees) and ESDC staff;
- As a result, the final number of participants will be confirmed prior to each workshop - participants' information will be provided to the contractor by the Project Authority or delegate at least three (3) weeks prior to the workshop. In some cases, information for last minute participants can be sent to the contractor the week prior to the workshop. All participants' information must be managed according to Article 6 Collection and use of Personal Information in the Government of Canada Privacy Act;
- Approximate number of attendees are as follows:

	National Standards	Item Bank	Editing	Translation
Subject Matter Experts (SMEs)	7-12	10-12	3-5	3-5
Trade Instructors	4-8	5-6	0	0
Host (P/T)		1	1	0
Facilitators (P/T)	1	5-6	0	0
ESDC Staff	3-5*	1	1	2
<b>Total</b>	<b>15-26</b>	<b>21-26</b>	<b>5-7</b>	<b>5-7</b>

\*Note: not all ESDC representatives will be required to attend the full 3 to 5-day workshop.

#### 4.4 Participant Professional Fees for workshops:

- SMEs attending the workshop are eligible to receive participant professional fees for each day of travel and attendance at the workshop;
- Trade instructors attending the workshop are only eligible to receive participant professional fees if they must travel on a Sunday and/or Saturday to attend/return home from the workshop (see Annex E for eligible expenses for workshops);
- No participant professional fees applies to the other attendees, workshop host, facilitators and ESDC staff; and
- The contractor will offer to participants that they may receive the first day of professional fees in advance, by cheque or electronic funds transfer. The whole amount or the balance of professional fees will be paid to them once their expense claim is submitted.

#### 4.5 Information Package:

Once the arrangements have been finalized, the contractor will send an information package (electronically) to each attendee (see Specific Workshop Requirements by Workshop in Annex D).

#### 4.6 Document Printing:

The contractor will be required to conduct in a competitive bidding process for a printing company to print 28 copies (22 English and 6 French) of the National Standard prior to Item Bank workshops. These copies must be delivered to the venue the week prior to the workshop. A list of printing companies will be provided to the contractor by the Project Authority (or delegate) at the beginning of the contract.

## 5 RESPONSIBILITIES

The contractor will be responsible for providing event management services for four (4) different types of workshops organized by ESDC: National Standards, Item Bank, Editing and Translation. The contractor should identify three (3) resources as follows:

- Senior Event Manager: acts as a Team Lead and manages event budgets;
- Financial Manager: manages payments to suppliers and attendees, and prepares invoices to ESDC; and
- Event Coordinator: serves as the primary contact person with attendees and venues, and coordinates travel arrangements as well as travel claims.

**Note:** A single resource may perform a maximum of two (2) of the above-mentioned roles. Refer to the evaluation grid at Annex F for more experience criteria for each of these resources.

For workshops, the contractor will be responsible for:

- Verifying, amending and paying invoices such as participant claims, venue invoices, hospitality and airfares;
- Consulting the Project Authority (or delegate) and the ESDC Workshop Lead for the workshop (electronically) with the food and beverage order no less than one (1) week prior to workshop;
- Making travel arrangements for participants within two (2) weeks of receipt of participant names unless otherwise instructed by the Project Authority (or delegate);
- Ensuring that the most economical option for travel is booked for each participant while also being reasonable with the participants' travel time;
- Providing the Project Authority (or delegate) and the ESDC Workshop Lead (electronically) with the arrival/departure times and accommodation arrangements of the attendees no less than one week prior to workshops, and with updates before the workshop, if required;
- Informing the Project Authority (or delegate) for any participant requirements exceeding predetermined requirements;
- Providing a 24-hour point-of-contact service with a toll-free number during meeting and travel periods for travel emergencies;
- Paying participant claims (by cheque or by electronic funds transfer) to the attendees within 14 calendar days of receipt of their expense claim;
- Ensuring meals of the attendees, as well as driving expenses are paid to them as per National Joint Council Guidelines for travel expenses;
- Ensuring that taxis and shuttles for attendees travelling to and from airports, as well as parking fees at the venue or the airport, are reimbursed according to the National Joint Council Guidelines; and
- Providing, at the end of ESDC's financial year (March 31<sup>st</sup>), a financial update on current projects, as requested by the Project Authority.

**NOTE:** The contractor's personnel are not required on-site during any of the workshops.

## **6 COLLECTION AND USE OF PERSONAL INFORMATION**

**6.1** For the purpose of allowing the contractor to perform the work under the contract, ESDC shall make available to the contractor, in accordance with the Department of Employment and Social Development Act and other applicable laws governing the protection of information under its control, the following information:

- Names of participants;
- Home addresses and telephone numbers of participants;
- Work addresses and telephone numbers of participants; and
- Email addresses of participants.

The contractor may collect other personal information directly from individuals only if it is required to perform the work described in the contract.

- 6.2 Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not use or disclose the information referred to in section 1 above except for the purpose of performing the work under the contract.
- 6.3 The Contractor shall maintain all information referred to in section above, and make sure it is only accessible, in Canada.
- 6.4 The Contractor shall segregate all records containing information referred to in section 1 above (whether in electronic format or in hard copy) from other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside Canada.
- 6.5 The Contractor shall ensure that all aspects of the processing of information referred to in section above are conducted in, and only accessible in Canada.
- 6.6 The Contractor shall take all necessary measures to ensure that every person hired, or the services of whom it retains to fulfill obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in section above.
- 6.7 Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in section 1 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.
- 6.8 The information referred to in section 1 above remains at all times under the control of ESDC.
- 6.9 The information referred to in section 1 above is protected by the Privacy Act and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the ESDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that ESDC may issue.
- 6.10 Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in section 1 above except with the written consent of ESDC.
- 6.11 Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall [destroy or return to ESDC] the information referred to in section 1 above and copies thereof, if any.
- 6.12 All information shall be destroyed in accordance with the ESDC Security Policy and Procedures Manual or other instructions that ESDC may issue.

6.13 The Contractor's premises shall be open for inspection by authorized representatives of ESDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.

6.14 The Contractor shall notify ESDC immediately after he becomes aware that a breach of any provision of this contract governing the protection of personal information has occurred.

6.15 Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by ESDC.

## **7 CONSTRAINTS**

### **7.1 Security Requirement**

Please see Part 6 – Collection and use of personal information.

### **7.2 Language requirements:**

The contractor must provide personnel who are capable of providing services in both English and French to the participants, ESDC personnel and any other concerned individual, if requested by the Project Authority.

**ANNEX B  
OFFICIAL RED SEAL TRADE NAMES**

Agricultural Equipment Technician	Insulator (Heat and Frost)
Appliance Service Technician	Ironworker (Generalist)
Auto Body and Collision Technician	Ironworker (Reinforcing)
Automotive Refinishing Technician	Ironworker (Structural/Ornamental)
Automotive Service Technician	Landscape Horticulturist
Baker	Lather (Interior Systems Mechanic)
Boilermaker	Machinist
Bricklayer	Metal Fabricator (Fitter)
Cabinetmaker	Mobile Crane Operator
Carpenter	Motorcycle Mechanic
Concrete Finisher	Oil Heat Systems Technician
Construction Craft Worker	Painter and Decorator
Construction Electrician	Partsperson
Cook	Plumber
Drywall Finisher	Powerline Technician
Electric Motor System Technician	Recreation Vehicle Service Technician
Floorcovering Installer	Refrigeration and Air Conditioning Mechanic
Gasfitter – Class A	Rig Technician
Gasfitter – Class B	Roofer
Glazier	Sheet Metal Worker
Hairstylist	Sprinkler Fitter
Heavy Duty Equipment Technician	Steamfitter/Pipefitter
Heavy Equipment Operator (Dozer)	Tilesetter
Heavy Equipment Operator (Excavator)	Tool and Die Maker
Heavy Equipment Operator (Tractor-Loader-Backhoe)	Tower Crane Operator
Industrial Electrician	Transport Trailer Technician
Industrial Mechanic (Millwright)	Truck and Transport Mechanic
Instrumentation and Control Technician	Welder



**ANNEX C  
TENTATIVE WORKSHOP SCHEDULE**

**INITIAL CONTRACT PERIOD**

**April to September 2019**

Please note that this schedule is tentative and all events are subject to change or cancellation.

**WORKSHOPS**

**National Standards**

Trade	Host	Month	Location
Instrumentation and Control Technician	ON	May 5 – 10, 2019	Ottawa
TBD	TBD	TBD	Ottawa

**Item Banks**

Trade	Host	Month	Location
Tool and Die Maker	ON	May 13 - 17, 2019	Toronto
Automotive Refinishing Technician	BC	TBD	TBD

**Editing**

Trade	Host	Month	Location
Tool and Die Maker	ON	June 11-13	Toronto
Automotive Refinishing Technician	BC	TBD	TBD

**Translation**

Trade	Host	Month	Location
Construction Electrician	NS	April 29 – May 2, 2019	Gatineau
Refrigeration and Air Conditioning Mechanic	NS	June 2019	Gatineau
Automotive Refinishing Technician	BC	TBD	Gatineau
Tool and Die Maker	ON	TBD	Gatineau

**OPTION PERIODS**

**October 2019 to March 2020 – Option Period 1**

Please note that this schedule is tentative and all events are subject to change or cancellation.

**WORKSHOPS**

**National Standards**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Item Banks**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Editing**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Translation**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD

**April to September 2020 – Option Period 2**

Please note that this schedule is tentative and all events are subject to change or cancellation.

**WORKSHOPS****National Standards**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Item Banks**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Editing**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

**Translation**

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

### October 2020 to March 2021 – Option Period 3

Please note that this schedule is tentative and all events are subject to change or cancellation.

#### WORKSHOPS

##### National Standards

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

##### Item Banks

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

##### Editing

Trade	Host	Month	Location
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD
TBD	TBD	TBD	TBD

##### Translation

Trade	Host	Month	Location
TBD	TBD	TBD	TBD

**ANNEX D**  
**SPECIFIC WORKSHOP REQUIREMENTS**  
**NATIONAL STANDARDS WORKSHOPS**

Any of these conditions and requirements is subject to change. The Project Authority (or delegate) will advise the contractor of any changes, if or when required.

**1 DURATION**

- Most Standards workshops will start on Sunday, around 4:30 pm and end on Friday; around 4:00 pm. Full-day meetings will be held on Monday to Friday, usually between 8:30 am and 4:30 pm.
- Some attendees may be required to travel a day in advance (Saturday) to ensure their presence on the first day at the required time. Participants arriving close to the start time of the workshop must travel the day of.
- Participants from P/Ts not involved in harmonization (e.g., always Quebec, other P/Ts that will be identified by ESDC) attend only Sunday to Thursday, and therefore are expected to return home Thursday evening, subject to travel schedules.
- All attendees (including the Host) are expected to return home Friday evening, subject to travel schedules.
- No return flights before 6:00 pm on Friday should be scheduled.

**2 LOCATION**

All workshops will be held in Ottawa. The venue should be at least a 3-star hotel in a central downtown location with accommodations suitable for a week-long stay (preferably with suite guest rooms).

**3 MEETING ROOM**

- Meeting room must be at least 66 ft. x 36 ft. (approximately 2375 sq. ft.).
- Meeting room must have one wall of unbroken wall space of at least 30 ft. This wall will be used to attach cards and flip chart sheets with mounting putty or tape as the document is being developed; preference will be giving to meeting rooms with a 14-ft. ceiling or higher.
- A combination of one (1) large room and one (1) or two (2) smaller adjoining spaces for breakout groups is preferable.
- Meeting room must be securable and rented on a 24-hour basis, Sunday at 2:00 pm through Friday 5:00 pm.
- Ensure accessibility to a power supply for six (6) laptops, six (6) monitors and one (1) projector.
- High-speed Wi-Fi is required.

**4 ATTENDEES**

A typical workshop will have between 15 and 26 participants. Invited to attend the workshop are:

- 12 SMEs, representing each province and territory, and national industry groups;
- 8 instructors representing provinces and territories for the duration of the workshop;
- 1 representative from the apprenticeship authority of the host province. This member, the Host, will assist the facilitating team in the development process of the standard at the workshop. (**Note:** the Host is not a participant and while travel expenses are paid, the professional fees are not); and
- 5 ESDC facilitators (local).

**NOTE:** Because not every P/T participates in the workshop, the actual number of attendees can vary from one workshop to another and total for each will be confirmed just before the workshop. Every effort will be made to ensure that attendees' information will be provided at least three (3) weeks prior

to the workshop. In some cases, information for last minute participants can be sent to the contractor the week prior to the workshop.

## **5 HOSPITALITY**

Food and beverages are to be provided Sunday afternoon:

- Approx. 4:00 pm: coffee, tea and soft drinks and light snack.

Food and beverages are to be provided Monday to Friday:

- Approx. 10:00 am: coffee, tea, juices, assorted pastries and sliced fruits; and
- Approx. 2:15 pm: coffee, tea, soft drinks, assorted snacks and sliced fruits.

**NOTE:** Cost of all hospitality expenses (including breaks, gratuities and taxes) must fall within the National Joint Council Guidelines and not exceed preapproved amounts per event provided by ESDC.

## **6 AUDIOVISUAL EQUIPMENT**

A screen (at least 8 ft. x 8 ft.) will be required for the duration of the workshop. ESDC will supply all other audiovisual equipment.

## **7 INFORMATION PACKAGE**

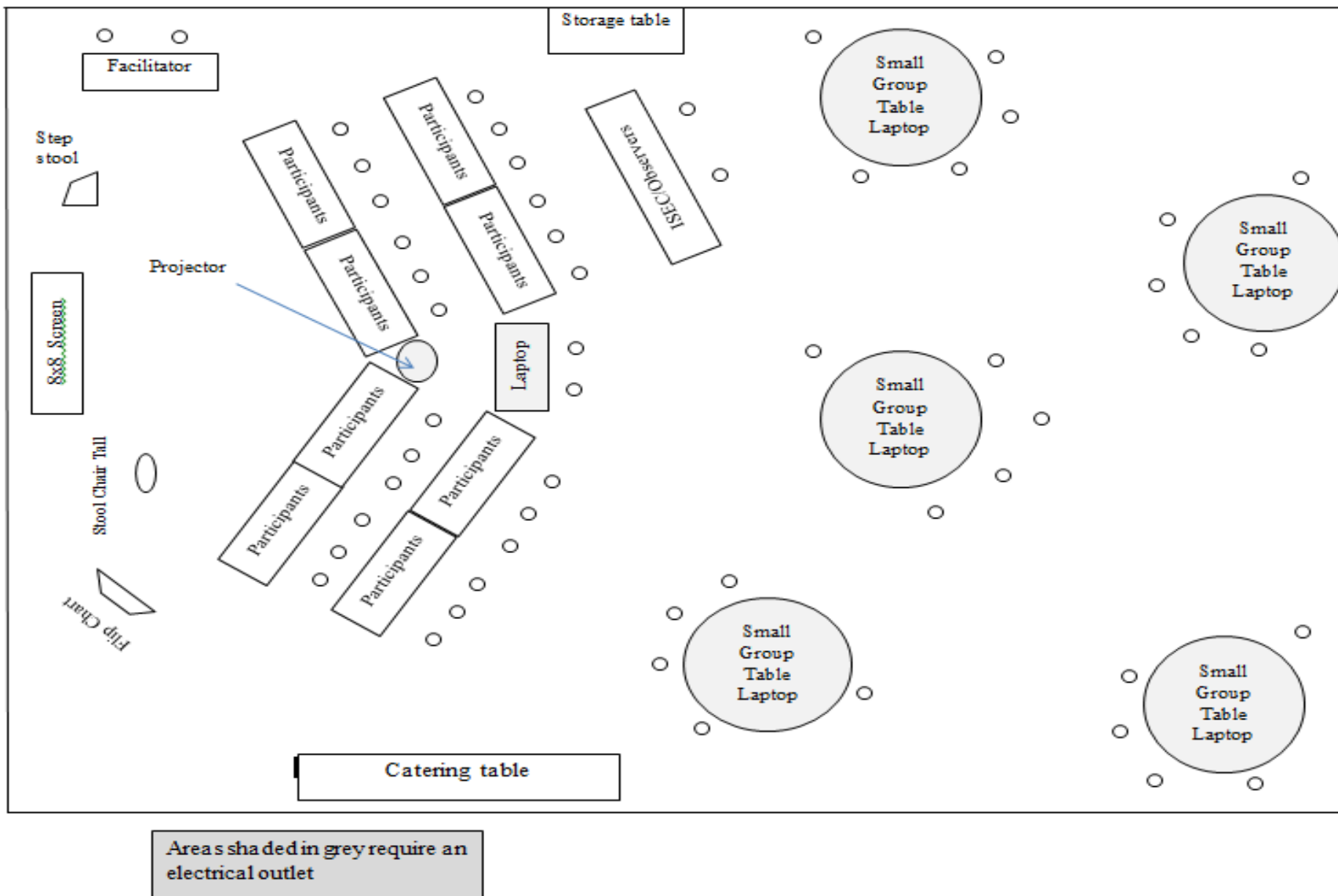
The contractor will be responsible for providing an information package to workshop participants, electronically. It should include the following:

- Travel ticket;
- Guest room reservation confirmation;
- Information required for payment (cheque or electronic funds transfer) of travel expenses for professional fees (for one (1) day), if applicable;
- Expense claim form and pre-addressed envelope, if applicable;
- Guidelines for workshop expenses;
- Information regarding the venue;
- A 24-hour point-of-contact service toll-free phone number for travel emergencies; and
- Other documents provided by ESDC giving the attendees more information on the Standard workshop (for example, introductory letter and workshop agenda).

## **8 MEETING ROOM SET-UP**

DIAGRAM 1 – RSOS Workshop Set-up

**DIAGRAM 1 – RSOS Workshop Set-up**



**NOTE:** Set-up may vary depending on the chosen location. Exact requirements will be confirmed prior to the workshop.

## **SPECIFIC WORKSHOP REQUIREMENTS ITEM BANK WORKSHOPS**

Any of these conditions and requirements is subject to change.

### **1 DURATION**

- Most item bank workshops will start on Monday at 6:00 pm and end on Friday around 4:00 pm. Full-day meetings will be held on Tuesday to Friday, usually between 8:30 am and 4:30 pm.
- Facilitators, the Host and the ESDC representative will be required to be in the meeting room by 3:00 pm on Monday.
- All other attendees (i.e., SMEs and instructors) will be expected to arrive at the venue on Monday before 6:00 pm to attend the group meeting.
- Some attendees may be required to travel a day in advance (Sunday) to ensure their presence on the first day at the required time.
- All attendees (including the Host) are expected to return home Friday evening, subject to travel schedules.
- No return flights before 6:00 pm on Friday should be scheduled.

### **2 LOCATION**

All item bank workshops will be held in Ottawa. The venue should be rated at least a 3-star hotel in a central downtown location with accommodations suitable for a week-long stay (preferably with suite guest rooms).

### **3 MEETING ROOM**

- Meeting room must be securable and rented on a 24-hour basis, Monday at 3:00 pm through Friday 5:00 pm;
- Meeting room must be at least 54 ft. x 34 ft. (approximately 1800 sq. ft.). Preference will be given to meeting rooms with a 14-ft. ceiling or higher;
- Meeting room must be large enough for 5 round tables (sitting 4 persons and holding a laptop, a monitor and material) with plenty of space between tables, plus 1 head table (rectangle) for 2 persons and 2 laptops, and a projector table;
- Meeting room must have an adequate number of power outlets to accommodate up to 8 laptops, 7 monitors and a projector; and
- Meeting room must have high-speed internet access, preferably both wireless and hard-wire, which can accommodate up to 8 laptops.
- It is not necessary for the venue to provide paper or pens on table.

### **4 ATTENDEES**

In most of Item Bank Workshops, participants to attend the workshop are:

- 10 SMEs from different provinces and territories;
- 5 instructors from different provinces and territories;
- 5 facilitators from different provinces and territories;
- 1 representative from the host province; and
- 1 ESDC representative (local).

**NOTE:** Attendees' information will be provided at least three (3) weeks prior to the workshop. In some cases, information for last minute participants can be sent to the contractor the week prior to the workshop.

## **5 HOSPITALITY**

Food and beverages are to be provided Monday afternoon:

- Approx. 5:00 pm: coffee, tea.

From Tuesday to Friday, food and beverages are to be provided as follows:

- Approx. 10:00 am: coffee, tea, juices, snack; and
- Approx. 2:15 pm: coffee, tea, soft drinks and snack.

**NOTE:** Cost of all hospitality expenses (including breaks, gratuities and taxes) must fall within National Joint Council Guidelines and not exceed pre-approved amount per event provided by ESDC.

## **6 AUDIOVISUAL EQUIPMENT**

A screen (8 ft. x 8 ft.) will be required for the duration of the workshop. ESDC will supply all other audiovisual equipment.

## **7 INFORMATION PACKAGE**

The contractor will be responsible for providing an information package to workshop participants electronically. It should include the following:

- Travel ticket;
- Guest room reservation confirmation;
- Expense claim form and pre-addressed envelope, if applicable;
- Guidelines for workshop expenses;
- Payment (cheque or electronic funds transfer) for professional fees (for one day), if applicable;
- Information regarding the venue;
- A 24-hour point-of-contact service toll-free phone number for travel emergencies; and
- Other documents provided by ESDC or the Item Bank coordinator (for example, introductory letter and workshop agenda).

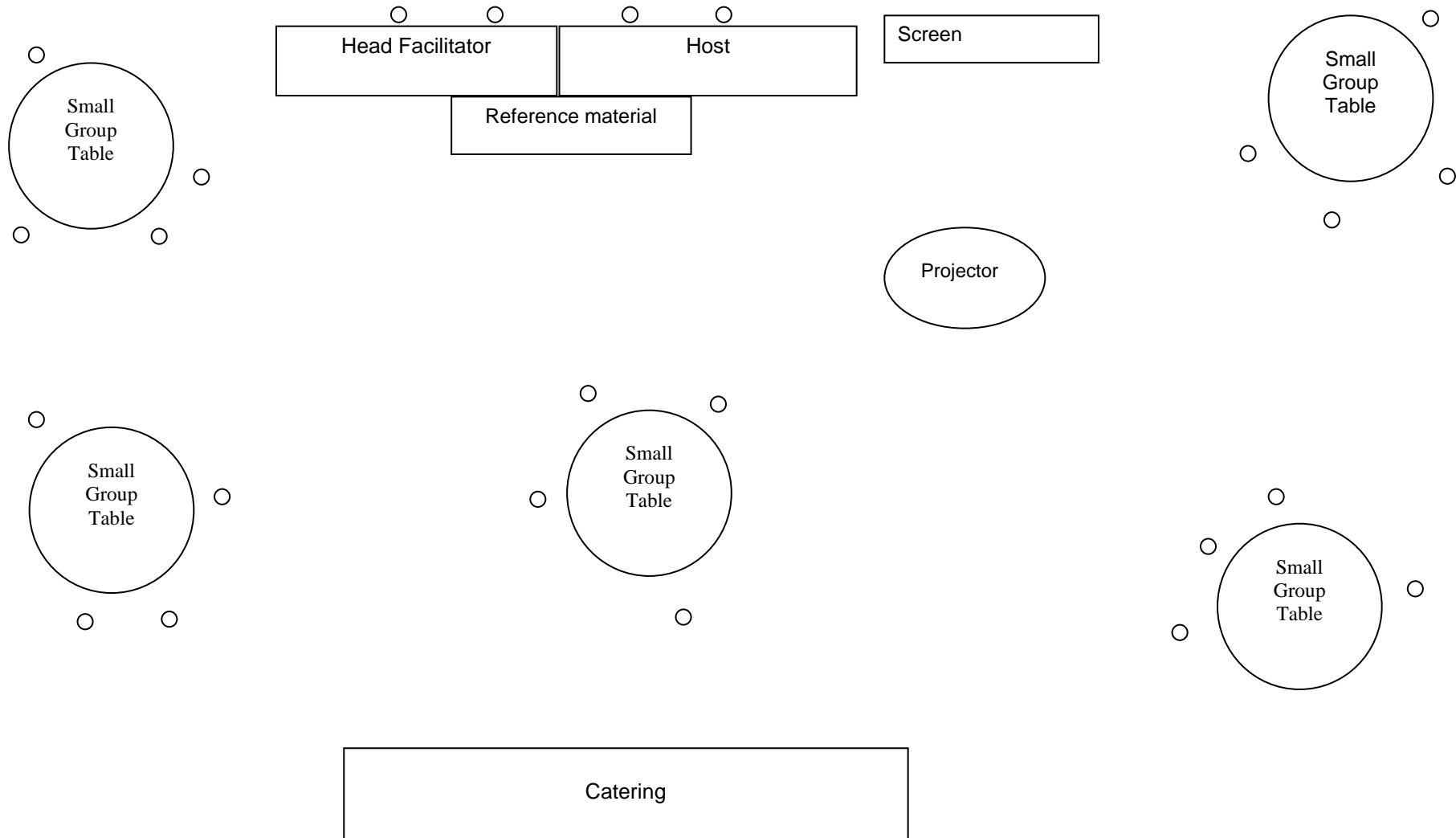
## **8 MEETING ROOM SET-UP**

DIAGRAM 2 – Item Bank Workshop Set-up



**DIAGRAM 2 – Item Bank Workshop Set-up**

Setup for Wednesday, Thursday and Friday Morning



## **SPECIFIC WORKSHOP REQUIREMENTS**

### **EDITING WORKSHOPS**

Any of these conditions and requirements is subject to change.

#### **1 DURATION**

- Depending on the size of the bank of questions, editing workshops will last between 3 and 4 days. Three-day (3) workshops will usually start on Tuesday at 8:30 am and end on Thursday around 4:30 pm. Four-day (4) workshops will usually start on Tuesday and end on Friday, usually between 8:30 am and 4:30 pm.
- All non-local attendees (i.e., SMEs) will be expected to arrive at the hotel the day before the workshop.
- All attendees (including the Host) are expected to return home Friday evening, subject to travel schedules.
- No return flights before 6:00 pm on the last day of the workshop should be scheduled.

#### **2 LOCATION**

Most editing workshops will be held in the Host P/T facilities. The venue should be rated at least 3-stars hotel in a central downtown location near the provincial apprenticeship office when the meeting is held in the apprenticeship office with accommodations suitable for a week-long stay (preferably with suite guest rooms).

#### **3 MEETING ROOM**

Most workshops will be held in the provincial apprenticeship office unless there are no boardrooms available. For workshops held in a venue:

- Meeting room must be securable and rented on a 24-hour basis, the first day of the workshop at 8:00 am through the last day of the workshop 5:00 pm;
- Meeting room must be able to accommodate seven (7) people, two (2) laptop and a projector. Preference will be given to meeting rooms with a 14-ft. ceiling or higher;
- Meeting room must have high-speed internet access, preferably both wireless and hard-wire, which can accommodate two (2) laptops.

#### **4 ATTENDEES**

Invited to attend the workshop are:

- 3-5 SMEs from the host province;
- 1 representative from the host province (local); and
- 1 ESDC representative.

**NOTE:** The actual number of attendees can vary from one workshop to another and total for each will be confirmed just before the workshop. Attendees' information will be provided as soon as possible.

#### **5 HOSPITALITY**

Food and beverages are to be provided each day of the workshop as follows:

- Approx. 10:00 am: coffee, tea, juices, snacks; and
- Approx. 2:15 pm: coffee, tea, soft drinks, snacks.

**NOTE:** Cost of all hospitality expenses (including breaks, gratuities and taxes) must fall within National Joint Council Guidelines (and not exceed pre-approved amount per event).

## **6 AUDIOVISUAL EQUIPMENT**

If the workshop is held in a hotel, a screen (8 ft. x 8 ft.) will be required for the duration of the workshop. ESDC or the host will supply all other audiovisual equipment.

## **7 INFORMATION PACKAGE**

The contractor will be responsible for providing an information package to workshop participants, either electronically or by mail. It should include the following:

- Travel ticket;
- Guest room reservation confirmation;
- Expense claim form and pre-addressed envelope, if applicable;
- Guidelines for workshop expenses;
- Information regarding the venue;
- A 24-hour point-of-contact service toll-free phone number for travel emergencies; and
- Other documents provided by ESDC or the editing workshop coordinator (for example, introductory letter and workshop agenda).

## **SPECIFIC WORKSHOP REQUIREMENTS TRANSLATION WORKSHOPS**

Any of these conditions and requirements is subject to change.

### **1 DURATION**

- Depending on the size of the bank of questions, translation workshops will last between 3 and 4 days. Three-day workshops will usually start on Tuesday at 8:30 am and end on Thursday around 4:30 pm. Four-day workshops will usually start on Tuesday and end on Friday, usually between 8:30 am and 4:30 pm.
- All attendees (i.e. SMEs) will be expected to arrive at the hotel the day before the workshop.
- All attendees (including the Host) are expected to return home Friday evening, subject to travel schedules.
- No return flights before 6:00 pm on the last day of the workshop should be scheduled.

### **2 LOCATION**

The workshop will be held in ESDC offices (140 Promenade du Portage) in Gatineau. The hotel should be at least a 3-star hotel within walking distance of the ESDC offices with accommodations suitable for a week-long stay (preferably hotels with suite guestrooms).

### **3 ATTENDEES**

Invited to attend the workshop are:

- 3-5 bilingual SMEs from different provinces and territories; and
- 2 ESDC representatives (local).

**NOTE:** The actual number of attendees can vary from one workshop to another and total for each will be confirmed just before the workshop. Attendees' information will be provided as soon as possible.

### **4 HOSPITALITY**

No hospitality will be offered.

### **5 INFORMATION PACKAGE**

The contractor will be responsible for providing an information package to workshop participants, electronically. It should include the following:

- Travel ticket;
- Guest room reservation confirmation;
- Expense claim form and pre-addressed envelope, if applicable;
- Guidelines for workshop expenses;
- Information regarding the venue;
- A 24-hour point-of-contact service phone number for travel emergencies; and
- Other documents provided by ESDC or the translation workshop coordinator (for example, introductory letter and workshop agenda).

**ANNEX E**  
**ELIGIBLE EXPENSES FOR WORKSHOPS AND MEETINGS (WHEN APPLICABLE)**

<b>ROLE</b>	<b>PROFESSIONAL FEES</b>	<b>MEALS<sup>1</sup></b>	<b>VENUE/HOTEL</b>	<b>GROUND TRANSPORTATION</b>	<b>OTHER EXPENSES</b>
<b>In-town SMEs</b>	\$200/day for each day of workshop	Lunch only	None	Provincial rate times number of km for each day of workshop	Parking with receipts if applicable
<b>Out-of-town SMEs</b>	\$200/day for each day of workshop and each day of travel	All meals	Room expenses on master account	Provincial rate times number of km	Taxis, parking and baggage fees with receipts
<b>In-town instructors</b>	None <sup>4</sup>	Lunch only	None	Provincial rate times number of km for each day of workshop	Parking with receipts if applicable
<b>Out-of-town instructors</b>	\$200/day for Saturday or Sunday travel days only <sup>2</sup>	All meals	Room expenses on master account	Provincial rate times number of km	Taxis, parking and baggage fees with receipts
<b>In-town facilitators</b>	None	None	None	None	None
<b>Out-of-town facilitators</b>	None	All meals	Room expenses on master account	Provincial rate times number of km	Taxis, parking and baggage fees with receipts
<b>In-town Host</b>	None	None	None	None	None
<b>Out-of-town Host</b>	None	All meals	Room expenses on master account	Provincial rate times number of km	Taxis, parking and baggage fees with receipts
<b>PDOs</b>	None	None	Room expenses on master account	Provincial rate times number of km	Taxis, parking and baggage fees with receipts

<sup>1</sup> As per National Joint Council Travel Guidelines

<sup>2</sup> Instructors claiming \$200 Professional fees Monday to Friday must provide an official letter from their employer confirming that they will not be receiving their regular wages.

**ANNEX “F”  
EVALUATION CRITERIA - MANDATORY AND TECHNICAL**

**MANDATORY TECHNICAL (MT) REQUIREMENTS**

The mandatory technical requirements listed will be evaluated on a pass/fail (i.e. compliant / non-compliant) basis. Proposals that fail to meet the mandatory technical requirements will be discarded at this stage without further consideration.

Proposals must demonstrate compliance with all of the following specifications and requirements and must provide the necessary documentation to support compliance in order to be considered.

**BASIS OF SELECTION:**

To be considered responsive, a bid must:

- meet all the mandatory technical requirement of this solicitation; and,
- obtain the required minimum of 80 points **(80%)** for each rated requirement.

**Statement of Compliance**

Requirement Number	Description(s)	Page No. / Paragraph no.	Compliant / Non compliant
MT1	<p><b>EXPERIENCE OF THE BIDDER</b></p> <p>The Bidder must prior to date of bid closing:</p> <ul style="list-style-type: none"> <li>• have been in business for a minimum of four (4) years including a minimum of three (3) years specializing in the provision of event management services; and</li> <li>• have a physical place of business within Canada.</li> </ul> <p>The bidder must provide, in writing:</p> <ol style="list-style-type: none"> <li>1. the number of years the firm has been in business;</li> <li>2. the number of years the firm has specialized in the provision of event management services; and</li> <li>3. the physical address(es) of the firm’s place(s) of business within Canada (including street address, city/town and province/territory for each).</li> </ol>		
MT2	<b>PROPOSED RESOURCES</b>		

	<p>The Bidder must identify one (1) resource as the Senior Event Manager, one (1) resource as the Financial Manager and one (1) resource as the Event Coordinator. The resource proposed must meet all of the criteria (see definitions below) for the respective category of personnel (Senior Event Manager, Financial Manager or Event Coordinator) for which they have been proposed. All of the resource proposed must be employees of the Bidder.</p> <p>The same resource may be proposed for two categories of personnel (e.g. Senior Event Manager and Event Coordinator); however the resource must meet all of the criteria for each category.</p> <p>The Bidder must provide the curriculum vitae of each proposed resource outlining their qualifications, training, education, language capability, related work experience and expertise in planning and organizing events and which demonstrates their capability to provide event management services as described in the Statement of Work (Annex A).</p> <p>The <b>Senior Event Manager</b> is a resource who meets all of the following prior to date of bid closing:</p> <ul style="list-style-type: none"> <li>• at least five (5) years' experience in the past eight (8) years leading the development and execution of events, involving travel coordination and hospitality;</li> <li>• has managed events with a total cost of \$45,000 or more;</li> <li>• has managed events with delegates from more than two (2) provinces or territories;</li> <li>• has managed events with a duration of three (3) days or more;</li> <li>• has managed events with a minimum of twelve (12) delegates; and</li> <li>• has provided or overseen the provision of all of the following: accommodations, hospitality and transportation.</li> </ul> <p>The <b>Financial Manager</b> is a resource who meets all of the following prior to date of bid closing:</p> <ul style="list-style-type: none"> <li>• at least three (3) years' experience in the past five (5) years providing financial management</li> </ul>		
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	<p>in special events, hospitality management, hotel management or tourism fields;</p> <ul style="list-style-type: none"> <li>• was responsible for the receipt, management and disbursement of funds for events with a total cost of \$45,000 or more.</li> </ul> <p>The <b>Event Coordinator</b> is a resource who meets all of the following, prior to date of bid closing:</p> <ul style="list-style-type: none"> <li>• at least two (2) years of experience in the past five (5) years coordinating the execution of events;</li> <li>• has coordinated events with a total cost of \$45,000 or more;</li> <li>• has coordinated events with delegates from more than two (2) provinces or territories;</li> <li>• has coordinated events with a duration of three (3) days or more;</li> <li>• has coordinated events with a minimum of twelve (12) delegates;</li> <li>• has coordinated the provision of two (2) or more of the following: accommodations, hospitality and transportation;</li> <li>• has coordinated more than two (2) events simultaneously.</li> </ul>		
<p><b>MT3</b></p>	<p><b>EVENTS MANAGEMENT PROJECTS</b></p> <p>The Bidder must provide information on three (3) events management projects, where the event dates were after January 1, 2012. Each of the Senior Event Manager, Financial Manager and the Event Coordinator identified in MT2 must have been involved in the planning of at least one (1) event. An event may be used to demonstrate the experience of more than one resource, however no more than three (3) projects are to be submitted. If more than 3 projects are submitted only the first 3 in order of presentation will be accepted. At a minimum, one (1) of the three (3) projects must demonstrate an ability of the Bidder to provide event planning services where the profile of participants is varied. “Participant” is defined as including, but not restricted to, a potential audience, actual delegate, speaker/presenter, moderator, facilitator, session chair, or member of a client group. “Varied” is defined as including three (3) or more of the following profiles within one event: general public, tradespersons, government representatives, senior executives, VIPs, etc.</p>		



	<p>Provide the following information for each of the three (3) projects:</p> <ul style="list-style-type: none"><li>a) Name of the project;</li><li>b) Description of the project;</li><li>c) Event location;</li><li>d) Duration of the event, including start and end dates;</li><li>e) Proposed resource(s) role in project;</li><li>f) Number of participants; and</li><li>g) Profile of participants (as defined above) at the event.</li></ul>		
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**POINT RATED TECHNICAL CRITERIA**

The criteria contained herein will be used by ESDC to evaluate each Proposal. Bidders are advised to address these requirements in the order presented, where possible, and in sufficient depth in their proposals to enable a thorough assessment. ESDC’s assessment will be based solely on the information contained within the Proposal. ESDC may seek further information or clarification from Bidders.

An item not addressed in the proposal will be deemed as either not meeting the criteria or given zero points under the point rated system.

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. To be considered compliant, bidders must obtain the required minimum of 80 percent. Proposals scoring less than 80 percent in any one (1) of these criteria will not be given further consideration. The rating is performed on a scale of 100 points.

<b>RATING SCALES AND CATEGORIES</b>	
<b>Bidders will be rated on the combined total score for the following non-mandatory criteria.</b>	
<b>Category</b>	<b>Definition</b>
<b>EXCELLENT 100%</b>	<ul style="list-style-type: none"> <li>• All elements are present</li> <li>• All elements are well described</li> <li>• Substantial details provide evaluators with a clear understanding of the methodology that the Bidder will use to plan, organize and manage an Item Bank workshop for the target audience and how to effectively communicate with it. The description provides clear details to outline the challenges in meeting ESDC’s workshop objectives with well thought-out solutions.</li> </ul>
<b>VERY GOOD 90%</b>	<ul style="list-style-type: none"> <li>• All elements are present</li> <li>• Most elements are well described</li> <li>• Substantial details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize and manage an Item Bank workshop for the target audience and how to effectively communicate with it. The description provides details to outline the challenges in meeting ESDC’s workshop objectives with solutions.</li> </ul>
<b>GOOD 80%</b>	<ul style="list-style-type: none"> <li>• Most elements are present</li> <li>• Most elements are well described</li> <li>• Details provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize and manage an Item Bank workshop for the target audience and how to effectively communicate. The description provides details to outline the challenges in meeting ESDC’s workshop objectives with some solutions.</li> </ul>
<b>UNACCEPTABLE 0%</b>	<ul style="list-style-type: none"> <li>• Information was not provided</li> <li>• Few elements present</li> <li>• Not enough details are described or are poorly described</li> <li>• Not enough details are provided to assess how the bidder’s approach and methodology will be used to meet to the requirements as described in the Statement of Work (Annexes A-E).</li> </ul> <p align="center">OR</p> <p>Details do not provide evaluators with an understanding of the methodology that the Bidder will use to plan, organize and manage an Item Bank workshop for the</p>

	<p>target audiences and/or how to effectively communicate with it.  OR  The description does not outline any challenges in meeting ESDC’s workshop objectives or does not provide any solutions.</p>
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**R.1 APPROACH, METHODOLOGY and R.2 PROJECT MANAGEMENT PLAN**

The Bidder should submit a detailed work plan to describe the methodology that it will use to plan, organize and manage the execution of one Item Bank workshop, as described in Annexes A-E.

The Bidder should also provide details to describe the most effective methods to communicate with the target audiences.

The description should outline any challenges in meeting ESDC’s overall Item Bank workshop objectives and ensure that Treasury Board Travel and Hospitality guidelines are met.

<b>R.1 Project Approach and Methodology (Maximum 100 points, Minimum of 80 points)</b>		
	<b>Maximum Points</b>	
	<b>100</b>	
<p>The Bidder must provide a detailed approach and methodology based on the requirements within the Statement of Work regarding an Item Bank workshop.</p> <p>The Bidder must supply an outline of their recommended approach and methodology for an Item Bank workshop.</p> <p>At a minimum, the following criteria will be evaluated: your approach, your understanding of the Item Bank workshop’s scope and challenges and the quality and effectiveness of the proposed plan.</p>		
<b>Comments:</b>		<b>Total Points: /100</b>

<b>R.2 Project Management Plan (Maximum 100 points, Minimum of 80 points)</b>		
	<b>Maximum Points</b>	
	<b>100</b>	
<p>The Bidder should provide a detailed description of the proposed project and risk mitigation plan and the procedures, schedule controls, as well as the tools and techniques that will be used to plan, organize and manage an Item Bank workshop. The plan must provide flexibility and take into account client needs.</p>		

<p>The Bidder should provide a detailed description of the Bidder’s procedures to identify risk associated with each elements of an Item Bank workshop as outlined in the Statement of Work.</p> <p>The description of the project management approach should demonstrate how the Bidder will ensure that performance, quality and the scheduled goals for an Item Bank workshop are achieved.</p> <p>The description of the project management approach should demonstrate how the Bidder proposes to work in collaboration with the Project Authority (or delegate) for the development of an Item Bank workshop.</p> <p>The description should outline the key areas of an Item Bank workshop that require input from ESDC.</p>		
<p><b>Comments:</b></p>		<p><b>Total Points:</b> <b>/100</b></p>

**Annex "G"**  
**FEDERAL CONTRACTORS PROGRAM**  
**FOR EMPLOYMENT EQUITY - CERTIFICATION**

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with such request by Canada will also render the bid non-responsive or will constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [ESDC-Labour's website](#).

Date: \_\_\_\_\_(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
  - A2. The Bidder certifies being a public sector employer.
  - A3. The Bidder certifies being a [federally regulated employer](#) being subject to the *Employment Equity Act*.
  - A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity \(AIEE\)](#) in place with ESDC-Labour.
- OR**
- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

**OR**

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

**Annex “H”**  
**Security Requirements Checklist**

To be added to final RFP document