

REQUEST FOR STANDING OFFER (RFSO) No. 304
EDITORIAL AND RELATED PROFESSIONAL SERVICES

Question & Answer # 1

This Question & Answer # 1, including any appendices attached hereto (the “Addendum”), amends and clarifies Request for Standing Offer (“RFSO”) No. 304, as previously amended and clarified (the “RFSO”). The RFSO otherwise remains unchanged and any capitalized words not defined herein have the meaning ascribed thereto in the RFSO.

Note to Bidders: The Deadline for Proposals was previously extended to 26 March, 2019. Bidders may, in writing, revoke or modify a proposal received at the Proposal Delivery Address at any time up to the Deadline for Proposals as described in section 1.1.2 of the RFSO.

1. Can a Bidder submit more than one editor for a stream? If that is the case:
 - a. How will the overall score be calculated (average of the exams)?
 - b. How will the rotation be done for stream 3? Will each of the proposed editors who has successfully passed the exam be included in each rotation?

Answer: No, a Bidder may not propose more than one (1) Editor for any Stream. In the event a Bidder’s proposal is selected for Standing Offer award, replacement or supplemental Editors may be supplied if the Editor’s ability, expertise and attainment is equal to or greater than the Editor proposed in the Technical Offer and otherwise in accordance with section 27 (Replacement or Supplemental Personnel) of the General Conditions in section 5 (Standing Offer Terms and Conditions) of the RFSO. In such an event, the proportional or rotational distribution of work among and between Contractors under Standing Offer will not increase or otherwise be modified as a result of the OAG’s approval of any replacement or supplemental Editors. In other words, the Contractor’s proportional or rotational distribution of work will be shared among and between that Contractor’s approved Editors. The OAG reserves the right, in its sole and absolute discretion, to require that any Editors take an in-person test and attend an in-person interview at any time during the Term of the Standing Offer Agreement.

2. Could you provide more details about the exam?
 - a. Will it take place on the OAG’s premises or on the Bidder’s premises?
 - b. How long will the exam last?
 - c. Will there be several optional dates? If not, what will happen if an editor is not available on the date of the exam?
 - d. How will it be marked?

Answer: The in-person test described in Step 2b of Section 3 (Basis and Method of Evaluation) will take place at the OAG office in Ottawa. Details will be provided after the Deadline for Proposals.

3. Could you break down the total value of call-ups made by the OAG under Standing Offer Agreements for editing and related professional services, amounting to approximately \$450,000 in 2017–2018, by language of service provided?

Answer: The value of call-ups issued for French editorial services in Fiscal Year 2017/2018 was approximately \$65,000. By submitting a proposal, Bidders acknowledge that the inclusion of this historical data in respect of the total value of call-ups does not represent a commitment by the OAG that the future usage of the services described in this RFSO will be consistent with this data. By submitting a proposal, Bidders also acknowledge that any such historical data is an approximation only and the OAG's estimate(s) of future usage is subject to change, in the OAG's sole and absolute discretion, at any time, up to and including subsequent to the effective date of the Standing Offer Agreement.

4. Why is the distribution of work for Stream 1 – English Professional Editing, i.e., 20% of the total hours invoiced to each of the five highest ranked contractors, different from the distribution of work for Stream 3 – French Professional Editing, i.e., a rotation system between contractors? Shouldn't the two services be treated equally?

Answer: The distribution method in each Stream satisfies the OAG's separate and distinct operational requirements for the work in that Stream.

5. Could you explain the proposed rotation system for Stream 3 (page 12 of the RFSO)? According to the first paragraph, "work will be distributed on a rotational basis among and between Contractors, beginning initially at the highest ranked Contractor and then subsequently at the next ranked Contractor as a result of the RFSO to determine if work can be satisfied and performed by that Contractor." However, according to the third paragraph, "The OAG may, in its sole and absolute discretion, contact any Contractor with a Call-Up for the Group A list to determine if any particular requirement can be satisfied and performed by that Contractor. If the Contractor is able to meet the OAG's work requirement (including but not limited to applicable deadlines), the OAG may assign the work to that Contractor under a Call-Up against the applicable Standing Offer without contacting any other Contractor."

Answer: No, the OAG is satisfied with the description of the selection methodology on pages 12 and 13 of the RFSO.

6. In the Rated Requirements, for Stream 3, there is point (b) Communication with the clients responsible for producing a document (25 points). Who are the clients? The authors of the document or the manager who assigned the editing work?

Answer: The word "client" refers to the person who requests and receives Editorial Services. At the OAG, "clients" are always OAG staff (e.g. managers in audit operations and corporate services).

7. Could you explain the work to be done for Stream 3 as you have done for Stream 1?

Answer: The services required for Stream 3 are as described in section 2 (Statement of Work) of the RFSO. Bidders may refer to the description of work in Stream 1 for additional details about substantive, stylistic and copy editing, as well as proofreading.

8. Do the 14 pages of the Technical Offer include Appendix A - Declarations and Certifications? This appendix alone is about 7 pages long.

Answer: The page limit described in section 4.1 (Organization of Proposal) applies to the Technical Offer only. Any pages containing content that the Bidder intends to be evaluated in response to the rated requirements should be limited to the specified maximum, preferably numbered and **excluding** the cover page, table of contents and **any required forms**. Any resumes should be included within the specified maximum if the Bidders intend the content contained therein to be evaluated. The OAG expects Bidders to optimize the content and format of their submission while respecting the page limit in section 4.1 (Organization of Proposal) of the RFSO. Any information contained in pages exceeding the stipulated maximum may not be evaluated, in the OAG's sole and absolute discretion.

9. I'm putting together a proposal for "RFSO #304, Editorial and Related Professional Services" and am wondering if I can attach the proposal in an email -- or should I only mail it?

Answer: The Proposal Delivery Address is: 240 Sparks Street Ottawa, Ontario K1A 0G6 Main Scanning Room S-143; S-1 Level. Please refer to section 1.2 (Proposal Format) and Section 4.1 (organization of the Proposal) of the RFSO.

10. With regard to the mandatory educational requirement, would a college diploma, experience and certification by Editors Canada be considered equivalent to an undergraduate degree?

The résumé table on page 17 lists diplomas as well as university degrees in the field about education and memberships. Yet the section on requirements for all streams, subsection i. "Education and Experience" (page 9) of the Request for Standing Offer states that "(a)ll Editors must also have an undergraduate degree or the equivalent as established by a recognized Canadian academic credentials assessment service, if obtained outside Canada."

Answer: No, a diploma or certificate program is not equivalent to an undergraduate baccalaureate or bachelor's program in Canada. The minimum education requirements are set out on page 9 of the RFSO. Bidders may include additional education and experience in accordance with the guidance on page 17 of the RFSO.

11. Section 3.1, Step 2b (page 14 of the RFSO): "For Stream 1 and 3 only, proposals deemed complaint in Step 1 will also be evaluated for specific editing skills with respect to an in-person written test administered by the OAG for the individual named in the Bidder's proposal."
QUESTION: Has OAG a date or dates in mind for administering the in-person written test? How much notice will bidders be given? If a Bidder is not available on the date fixed for the test, will OAG arrange an alternate date?

Answer: SEE ANSWER TO QUESTION 2.

12. Section 4.1, Organization of Proposal, para. 1: "Technical Offers for Streams 1 and 3 should each be limited to a maximum of 14 single-sided pages (or 7 double sided pages). Technical Offers for Stream 2 should be limited to a maximum of 4 single-sided pages (or 2 double sided pages)."

QUESTION:

Does the page limit specified for Technical Offers include or exclude the declarations and certifications in Appendix A?

Answer: SEE ANSWER TO QUESTION 8.

13. Section 4.1, Organization of Proposal, para. 2: "In addition to the one (1) paper original, Bidders should provide four (4) paper copies and one electronic copy on CD or USB."

QUESTIONS:

Are bidders required to submit one paper original, four paper copies and one electronic copy of the signed declarations and certifications in Appendix A? Are bidders required to submit one paper original, four paper copies and one electronic copy of the Financial Offer?

Answer: Bidders are not required to submit more than one (1) copy of the forms listed in Appendix A (Declarations and Certifications) and one (1) copy of the Financial Offer.

14. On page 16 of the OAG RFSO, last paragraph, does "No points will be assigned to Technical Offers for compliance with any Mandatory Requirements" mean simply that you don't get awarded any points just for having submitted a completed technical offer, regardless of its attributes?

Answer: Please refer to Step 1 and Step 2 in section 3.1 (Evaluation Process) in section 3 (Basis and Method of Evaluation).

15. If I am submitting my bid after a first successful big for a SO with the Office of the Auditor General, am I allowed to mention the work I've done for the OAG in the past four years?

Answer: Yes, Bidders may refer to prior OAG work in their responses to any Mandatory and Rated Requirements.

16. Currently I am a subcontractor under a larger firm that supplies OAG editing services—although I also have my own sole proprietorship. If desired, am I allowed to apply to this RFSO under my own company name? If so, is further permission and paperwork required?

Answer: A Bidder, who is the person or entity submitting a proposal responding to the requirements of the RFSO and having legal capacity to contract, may not submit more than one (1) proposal for each Stream. However, the RFSO does not restrict any number of Bidders from proposing the same Editor, who is the person proposed by the Bidder to perform the work described in section 2 (Statement of Work) of the RFSO. For greater certainty, in the event two (2) or more Bidders propose the same Editor and the Bidders are assigned to the same Stream, the preferential distribution of work to Bidders will not be affected by the performance of work by the same Editor for two (2) or more Bidders. In other words, work will be distributed among and between Bidders with the highest overall rankings in each Stream and Bidders will be required to provide the services of the specific Editors identified in their Technical Offer.

17. If applying as a subcontractor under another firm, does each EDITOR in the company propose a separate hourly rate, or is there just one hourly rate for the COMPANY? i.e. Is each PERSON's CV assessed and rated individually?

Answer: Bidders are to respond to the pricing table by inserting **one hourly rate for each Stream** in the Financial Offer for each of the fields specified, which shall be deemed the quoted all-inclusive fixed, firm hourly rate. For greater certainty, this single hourly rate will apply to any and all Editors who perform services in each Stream described in section 2 (Statement of Work). The OAG does not require more than one (1) proposed Editor (e.g. one (1) résumé) for the evaluation process described in section 3 (Basis and Method of Evaluation), although the OAG may, in its sole and absolute discretion, require replacement or supplemental Editors under the Standing Offer in accordance with section 27 (Replacement or Supplemental Personnel) of the General Conditions in Section 5 (Standing Offer Terms and Conditions) of the RFSO.

18. Is it possible for the Contractor to be rated among the top Bidders, while a Contractor Personnel (or subcontractor) is not? Or vice versa?

Answer: No. Proposals deemed compliant in Step 3 of section 3.1 (Evaluation Process) of the RFSO will be ranked from highest to lowest in each Stream based on the combined total score of technical merit, editing skill and price, calculated by adding the rated score, testing score (if applicable) and financial points assigned to the proposal. Bidders will be assigned into groups consisting of the specific numbers of Bidders who receive the highest combined total scores pursuant to the RFSO. All work will be preferentially distributed to the Editors specifically identified in the Bidder's Proposal.

19. Under what circumstances might it be best to apply as a subcontractor under a larger company?

Answer: Without limitation to section 1.14 (Disclaimer) of the RFSO, Bidders are solely responsible for, if necessary, making their own investigations, projections and conclusions and consulting their own advisors about strategies for responding to the information contained in this RFSO.

20. Under what circumstances would it be best to apply under my own smaller company, rather than subcontract to a larger firm?

Answer: Without limitation to section 1.14 (Disclaimer) of the RFSO, Bidders are solely responsible for, if necessary, making their own investigations, projections and conclusions and consulting their own advisors about strategies for responding to the information contained in this RFSO.

21. Section 4.4 states that "rates shall be quoted as per hour, expressed in Canadian dollars, for three years and for three optional years." Is this one rate for all six years, or one rate for the three years, followed by a separate rate for the optional years?

Answer: The rate quoted by the Bidder will apply for up to six (6) years if awarded a Standing Offer. Bidders are to respond to the pricing table by supplying a single all-inclusive firm rate, per Stream being applied to, which shall be valid for three (3) years and three (3) option years. For greater certainty, the rate may be subject to increase during any extended Term in accordance with A6 of Section 5 (Standing Offer Terms and Conditions), which shall not exceed the lesser of:

(i) two percent (2%); or (ii) the maximum change in the Consumer Price Index All-Items for Canada as published by Statistics Canada for the twelve (12) month period preceding the expiration date of the then applicable year.

22. The RFSO requires bidders to provide examples of past work, but does not seem to require any references. However, Section 4.5 (ii) suggests that OAG might request references. Would it be preferable for bidders to provide references along with the examples, or wait for a request from OAG?

Answer: Bidders are not required to supply references as part of their Proposal at this time.

23. The “Bidder’s Legal and Business Information” table in Appendix A requests a facsimile number. Is this required or optional?

Answer: This is optional, Bidders are to supply a facsimile number only if available.

24. In the Section 2 descriptions of the types of editing required under Stream 1, English Professional Editing, I am wondering about Comparative Editing. This category of editing would seem to require the editor to have a professional translator’s ability to ensure that translated text is accurate, and even to actually do a certain amount of translating from French to English. Is this going to be a requirement for all editors? In our experience, translation is a specialized service that is not usually handled by (or required of) editors, especially when the requirement is for English professional editing.

Answer: Comparative editing is a service required by the OAG within the scope of the RFSO. However, the expertise and experience of a Bidder’s proposed Editor with this type of editing will be evaluated and assigned up to five (5) points as described for Stream 1 in section 4.3 (Rated Requirements) of the RFSO.

25. In Section 4 in the Mandatory Requirements table that bidders are encouraged to include in their proposals, does the column heading “References” refer to page numbers where the included information can be found in the bid? Or to people who can provide references?

Answer: “Without limitation to section 4.2 (Mandatory Requirements) of the RFSO, Bidders are encouraged to complete the table and submit it as part of their proposal. Bidders should also indicate beside the Mandatory Requirement the relevant page number(s) from their proposal where the statements and supporting material for the Mandatory Requirement is addressed.

26. Also for the Mandatory Requirements section, can bidders submit their existing resumé as long as they contain all of the categories shown in the sample resume on page 17, or would you recommend that we create a new, custom resumé for the bid that follows the provided template exactly? Is there a maximum length for the resumé?

Answer: Bidder should provide a resumé for their proposed Editor in accordance with the guidance set out in section 4.2 (Mandatory Requirements) and should be limited to a maximum of three (3) single-sided pages (or 1.5 double-sided pages), provided that the Technical Offer

should not exceed the maximums described in section 4.1 (Organization of the Proposal) of the RFSO.

27. For the financial bid, the text discusses a three-year contract period with up to three additional option years. But the instructions say to submit one “all-inclusive fixed, firm hourly rate” by completing the providing pricing table. Should we add rows to the table to show rates for all of the contract and option years? Or are you suggesting we come up with a single hourly rate that would remain valid for up to six years? In other words, how do we reflect a changing hourly rate over the course of the potential length of the contract?

Answer: SEE ANSWER TO QUESTION 21.

28. For the Rated Requirements, I would like to confirm that you are not requesting or evaluating any past work samples or client references. Points will be awarded based solely on the items listed in the Rated Requirements table?

Answer: Please see Step 2a of section 3.1 (Evaluation Process) of the RFSO.

29. Also for the Rated Requirements, are there minimum or maximum lengths/word counts (or suggested guidelines regarding length) for any or all of the categories in the table?

Answer: SEE ANSWER TO QUESTION 8.

30. Why was a table of contents not included in the call for tenders document whereas it is the longest call for tenders document (63 pages) since the 2010 call for tenders (which totalled 29 pages and included a table of contents) and the 2013 call for tenders (which totalled 33 pages and included a table of contents)? I raise this point because, in addition to being the longest call for tenders document, and by far the longest since 2010, I do not believe that the organization of the information in the document is particularly user-friendly.

Answer: The table under the heading “Incorporated Sections and Forms” on page 1 lists the contents of the RFSO.

31. Page 20 of the RFSO, section 4.1 Proposal Organization. The following is specified, “Technical Offers for Streams 1 and 3 should each be limited to a maximum of 14 single-sided pages (or 7 double sided pages).” Should this maximum number of pages include or not include the declarations and certifications required in section 1.4 on page 4, and detailed in Appendix A?

Answer: SEE ANSWER TO QUESTION 8.

32. Pages 20 and 21 of the RFSO, section 4.2 Mandatory Requirements. In the first table at the end of page 20, which continues at the beginning of page 21, only one mandatory requirement number is indicated, O-1. Are we to understand, then, that there is ONLY ONE mandatory requirement, which is the one described in two paragraphs in this table? I am asking the question because the first paragraph of section 4.2 states the following, “Failure to comply with **ANY** one (1) or more of the Mandatory Requirements will result in a proposal being deemed non-compliant and given no further consideration.” Usually, when there are SEVERAL mandatory requirements, each one has a separate number. For example, the OAG’s 2013 call for tenders

for the same services included four mandatory requirements, O-1, O-2, O-3 and O-4, while the OAG's 2010 call for tenders included seven mandatory requirements, M-1, M-2, M-3, M-4, M-5, M-6 and M-7.

Answer: Yes, failure to comply with Mandatory Requirement M-1 will result in a proposal being deemed non-compliant and given no consideration.

33. Page 23 of the RFSO, Table of Rated Requirements, Stream 3. Element "b" states as follows, "(The bidders should demonstrate the expertise and experience of their proposed Editor in relation to the following elements) b. Editor's role liaising with clients in production of the document (25 points)." I have been a professional editor since 1991 (with a university degree in communications). Nevertheless, I do not really understand what is requested here, i.e., the type of information expected on this topic, and the format it is supposed to be submitted in. It should be more clearly explained what specific type of information the Bidder is being asked to provide in this regard and in what format, supported with examples to clarify understanding. The current vague wording of this element is very concerning given the fact that this element, very surprisingly, represents 25 points out of 55, which is nearly half of the points for the stream in question whereas it is drowned in a sea of technical information that requires an enormous amount of time for reading and understanding, and it is difficult to find the information that is ESSENTIAL for submitting a proposal of a quality meeting the OAG's expectations.

Answer: .The OAG is satisfied with the description of the Rated Requirements. For greater certainty, the OAG requires Editors who have expertise and experience liaising with clients in producing a document and who have an understanding of the Editor's role in that working relationship. In addition, the OAG requires Editors who are capable of providing superior client service. Please also refer to Question 6.

34. Page 23 of the RFSO, section 4.4 Financial Requirements. Are we to assume that, for the stream corresponding to the proposal made by the Bidder, the hourly rate indicated by the Bidder must be a single rate, in all circumstances, and that the rate will be applied without any increase during the initial three-year period and each of the three optional extension periods of one (1) year each?

Answer: SEE ANSWER TO QUESTION 21.

35. Pages 57 to 63 of the RFSO. The Declarations and Certifications section ("Declarations and Certifications") identifies and explains nine elements. What must the Bidder do EXACTLY? Should the Bidder copy/paste each of the nine elements and sign each separately? Must the Bidder copy/paste this whole section in a block and sign it once in the signature block found on page 63 of the RFSO? Is the signature block at the bottom of page 63 solely related to element 9 on page 63 or to the whole Declarations and Certifications section? Is this series of declarations, or each one separately, available in a "fillable" format, since, in some of them, we are asked to "tick# some boxes?"

Answer: Bidders are to include all Declarations and Certifications set out in the RFSO. The Bidder may do so by including the completed forms listed in Appendix "A" (Declarations and Certifications) within their proposal.