



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

By Mail:

Parks Canada Agency Bid Receiving Unit  
National Contracting Services  
ATTN: Laura Lowson 5P300-19-0033/A  
111 Water Street East  
Cornwall, ON K6S 6S2

**REQUEST FOR PROPOSAL**

**DEMANDE DE PROPOSITION**

**Proposal to: Parks Canada Agency**

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 or attached hereto, the goods, services and construction listed herein or on any attached sheets at the price(s) set out therefor.

**Proposition à : l'Agence Parcs Canada**

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

**Comments - Commentaires :**

**Issuing Office - Bureau de distribution :**

Parks Canada Agency  
National Contracting Services  
111 Water Street East  
Cornwall, ON K6H 6S2

<b>Title - Sujet :</b> Visitor Experience Strategy & Associated Infrastructure Planning – Thousand Islands National Park – Mallorytown Landing	
<b>Solicitation No. - N° de l'invitation :</b> 5P300-19-0033/A	<b>Date :</b> May 30, 2019
<b>Client Reference No. - N° de référence du client :</b> N/A	
<b>GETS Reference No.   N° de référence du SEAG :</b> PW-19-00876495	

<b>Solicitation Closes - L'invitation prend fin :</b> At - à : 2 pm On - le : July 9, 2019	<b>Time Zone - Fuseau horaire</b>  EDT
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<b>F.O.B. - F.A.B. :</b> Plant - Usine : <input type="checkbox"/> Destination : <input checked="" type="checkbox"/> Other - Autre : <input type="checkbox"/>		
<b>Address Enquiries to - Adresser toutes demande de renseignements à :</b> Laura Lowson		
<b>Telephone No. - N° de téléphone :</b> 613-938-5791	<b>Fax No. -N° de télécopieur :</b>	<b>Email Address – Courriel :</b> laura.lowson@canada.ca
<b>Destination of Goods, Services, and Construction - Destination des biens, services et travaux de construction :</b> 2 County Road 5, Mallorytown, ON K0E 1R0		

**TO BE COMPLETED BY THE BIDDER - À REMPLIR PAR LE SOUMISSIONNAIRE**

<b>Vendor/ Firm Name - Nom du fournisseur/de l'entrepreneur :</b>	
<b>Address - Adresse :</b>	
<b>Telephone No. - N° de téléphone :</b>	<b>Fax No. - N° de télécopieur :</b>
<b>Name of person authorized to sign on behalf of the Vendor/ Firm (type or print) - Nom de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie) :</b>	
<b>Signature :</b>	<b>Date :</b>

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## **IMPORTANT NOTICE TO BIDDERS**

### **Direct Deposit**

The Government of Canada has replaced cheques with direct deposit payment(s), an electronic transfer of funds deposited directly into a bank account. New vendors who are awarded a contract will be required to complete a Direct Deposit enrolment form in order to register their direct deposit information with Parks Canada to receive payment.

Additional information on this Government of Canada initiative is available at:

<http://www.directdeposit.gc.ca>

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## **PART 1 – GENERAL INFORMATION**

### **1.1 Security Requirements**

There is no security requirement associated with the bid solicitation.

### **1.2 Statement of Work**

The Work to be performed is detailed under Annex A of the resulting contract clauses.

### **1.3 Bidder's Conference**

A bidders' conference will be held at 1 Fort Henry Drive, Kingston, ON K7K 5G8 (see separately attached map) on Tuesday June 18, 2019. The conference will begin at 1:30 pm EDT. The scope of the requirement outlined in the bid solicitation will be reviewed during the conference and questions will be answered. It is recommended that bidders who intend to submit a bid attend or send a representative.

Bidders are requested to communicate with the Contracting Authority before the conference to confirm attendance. Bidders should provide, in writing, to the Contracting Authority, the name(s) of the person(s) who will be attending and a list of issues they wish to table no later than Monday June 17, 2019 at 2 pm EDT.

Any clarifications or changes to the bid solicitation resulting from the bidders' conference will be included as an amendment to the bid solicitation. Bidders who do not attend will not be precluded from submitting a bid.

### **1.4 Debriefings**

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

### **1.5 Trade Agreements**

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

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## **PART 2 – BIDDER INSTRUCTIONS**

### **2.1 Standard Instructions, Clauses and Conditions**

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

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

The [2003](#) (2018-05-22), Standard Instructions – Goods or Services – Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

### **2.2 Submission of Bids**

Bids must be submitted only to Parks Canada Agency Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

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

### **2.3 Enquiries – Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than ten (10) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

### **2.4 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.

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## **PART 3 – BID PREPARATION INSTRUCTIONS**

### **3.1 Bid Preparation Instructions**

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

Section I: Technical Bid (1 hard copy and 1 soft copy on USB)

Section II: Financial Bid (1 hard copy and 1 soft copy on USB)

Section III: Certifications (1 hard copy and 1 soft copy on USB)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Bidders should:

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

#### **Section I: Technical Bid**

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

#### **Section II: Financial Bid**

Bidders must submit their financial bid in accordance with the Basis of Payment.

#### **Section III: Certifications**

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

## **PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### **4.1.1 Technical Evaluation**

##### **4.1.1.1 Mandatory Technical Criteria**

Technical bids will be evaluated against the technical evaluation criteria at Annex F.

##### **4.1.1.2 Point Rated Technical Criteria**

Technical bids will be evaluated against the technical evaluation criteria at Annex F.

#### **4.1.2 Financial Evaluation**

SACC *Manual* clause [A0220T](#) (2014-06-26), Evaluation of Price

### **4.2 Basis of Selection**

#### **4.2.1 Highest Combined Rating of Technical Merit 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 specified for each criterion for the technical evaluation, and
    - d. obtain the required minimum of 300 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 500 points.
  2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
  3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.
  4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
  5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
  6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
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7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

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

		Bidder 1	Bidder 2	Bidder 3
<b>Overall Technical Score</b>		115/135	89/135	92/135
<b>Bid Evaluated Price</b>		\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	<b>Pricing Score</b>	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
<b>Combined Rating</b>		83.84	75.56	80.89
<b>Overall Rating</b>		1st	3rd	2nd

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## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION**

Bidders must provide the required certifications and additional information to be awarded a contract.

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

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

### **5.1 Certifications Required with the Bid**

Bidders must submit the following duly completed certifications as part of their bid.

#### **5.1.1 Integrity Provisions - Declaration of Convicted Offences**

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, if applicable, the declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

### **5.2 Certifications Precedent to Contract Award and Additional Information**

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

#### **5.2.1 Former Public Servant**

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required at Annex D to Part 5 of the Bid Solicitation before contract award.

#### **5.2.2 Integrity Provisions – Required Documentation**

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

The Bidder, regardless of their status under the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html), must submit a list of names prior to award of a contract. Bidders must provide the information requested at Annex E to Part 5 of the Bid Solicitation.

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### **5.2.3 Federal Contractors Program for Employment Equity – Bid Certification**

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

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

### **5.2.4 Additional Certifications Precedent to Contract Award**

#### **5.2.4.1 Status and Availability of Resources**

*SACC Manual* clause [A3005T](#) (2010-08-16), Status and Availability of Resources

#### **5.2.4.2 Education and Experience**

*SACC Manual* clause [A3010T](#) (2010-08-16), Education and Experience

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## **PART 6 - RESULTING CONTRACT CLAUSES**

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

### **6.1 Security Requirements**

There is no security requirement applicable to the Contract.

### **6.2 Statement of Work**

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

### **6.3 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>) issued by Public Works and Government Services Canada.

#### **6.3.1 General Conditions**

2010B (2018-06-21), General Conditions – Professional Services (Medium Complexity), apply to and form part of the Contract.

All reference to the Minister of Public Works and Government Services Canada shall be deleted and replaced with the Minister of the Environment for the purposes of the Parks Canada Agency. All reference to the Department of Public Works and Government Services Canada shall be deleted and replaced with the Parks Canada Agency.

### **6.4 Term of Contract**

#### **6.4.1 Period of the Contract**

The period of the Contract is from date of Contract to September 1, 2020 inclusive.

#### **6.4.2 Optional Goods and/or Services**

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at PD 2.3 Scope of Work and Associated Required Services, Phase 5 – Product Development section c) of the Statement of Work at Annex A of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

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

### **6.5 Authorities**

#### **6.5.1 Contracting Authority**

The Contracting Authority for the Contract is:

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Laura Lawson  
Contracting Officer  
Parks Canada Agency  
National Contracting Services  
Chief Financial Officer Directorate  
111 Water Street East, Cornwall, ON K6H 6S2

Telephone: 613-938-5791  
E-mail address: [laura.lowson@canada.ca](mailto:laura.lowson@canada.ca)

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

### 6.5.2 Project Authority

The Project Authority for the Contract is:

\*\*\* to be provided at contract award \*\*\*

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.

### 6.5.3 Contractor's Representative

The Contractor's Representative for the Contract is:

<b>Representative's Name:</b>		
<b>Title:</b>		
<b>Vendor/ Firm Name:</b>		
<b>Address:</b>		
<b>City:</b>	<b>Province / Territory:</b>	<b>Postal Code / ZIP Code:</b>
<b>Telephone:</b>	<b>Facsimile:</b>	
<b>Email Address:</b>		
<b>Procurement Business Number (PBN) or Goods and Services Tax (GST) Number:</b>		

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## 6.6 Proactive Disclosure of Contracts with Former Public Servants

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

## 6.7 Payment

### 6.7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid firm prices, as specified in Annex B for a cost of \$ \_\_\_\_\_<sup>\*\*\*</sup> to be provided at contract award<sup>\*\*\*</sup>. Customs duties are included and Applicable Taxes are extra.

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

### 6.7.2 Milestone Payments – Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

### 6.7.3 Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

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Milestone No.	Description or "Deliverable"	Firm Amount	Due Date or "Delivery Date"
1	<b>Phase 1 - Preparation</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
2	<b>Phase 2 - Goals and Vision Confirmation</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
3	<b>Phase 3 - Target Market Assessment</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
4	<b>Phase 4 - VE Assessment</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
5	<b>Phase 5 - Product development</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
6	<b>Phase 6 - Offer Evaluation and Implementation Plan</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
7	<b>Phase 7 - Final report</b>	*** to be provided at contract award ***	Upon Delivery due on or before March 31, 2020
8	<b>Phase 8 - Visual and promotional content development</b>	*** to be provided at contract award ***	May 31, 2020

## 6.8 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. Invoices must be distributed as follows:
  - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

## 6.9 Certifications and Additional Information

### 6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

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## **6.10 Applicable Laws**

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

## **6.11 Priority of Documents**

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

- (a) the Articles of Agreement;
- (b) the general conditions 2010B (2018-06-21), General Conditions: Professional Services (medium complexity);
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment ;
- (e) the Contractor's bid dated **\*\*\* to be inserted at contract award \*\*\***.

## **6.12 Specific Person(s)**

The Contractor must provide the services of the following person(s) to perform the Work as stated in the Contract: \_\_\_\_\_ **\*\*\* to be inserted at contract award \*\*\***.

## **6.13 Replacement of Specific Individuals**

1. If specific individuals are identified in the Contract to perform the Work, the Contractor must provide the services of those individuals unless the Contractor is unable to do so for reasons beyond its control.
2. If the Contractor is unable to provide the services of any specific individual identified in the Contract, it must provide a replacement with similar qualifications and experience. The replacement must meet the criteria used in the selection of the Contractor and be acceptable to Canada. The Contractor must, as soon as possible, give notice to the Contracting Authority of the reason for replacing the individual and provide:
  - a. the name, qualifications and experience of the proposed replacement; and
  - b. proof that the proposed replacement has the required security clearance granted by Canada, if applicable.
3. The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a replacement stop performing the Work. In such a case, the Contractor must immediately comply with the order and secure a further replacement in accordance with subsection 2. The fact that the Contracting Authority does not order that a replacement stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the Contract.

## **6.14 Insurance Requirements**

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

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## **6.15 Inspection and Acceptance**

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

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## **ANNEX A**

### **STATEMENT OF WORK**

#### **PROJECT DESCRIPTION**

##### **PD 1 PROJECT INFORMATION**

###### **PD 1.1 Parks Canada Project Title:**

**TINP – Visitor Experience Strategy & Associated Infrastructure Planning**

###### **PD 1.2 Project Location: Thousand Island National Parks – Mallorytown Landing**

**PD 1.3 Project Number: CAI PRO 1149 – Landon Bay recapitalization**

**PD 1.4 Client: Georgian Bay and Ontario East Field Unit, Parks Canada Agency**

##### **PD 2 PROJECT INTRODUCTION AND BACKGROUND**

###### **PD 2.1 USER DEPARTMENT**

The User Department, referred to throughout this Statement of Work is Parks Canada Agency (PCA), Georgian Bay and Ontario East Field Unit.

###### **PD 2.2 PROJECT OBJECTIVE AND BACKGROUND**

###### **Project Background**

Located in the Eastern Ontario portion of the St. Lawrence River, on traditional Haudenosaunee and Mississauga Anishinaabe lands, Thousand Islands National Park (TINP) is a fragmented, historically island-based park and the home of numerous species at risk. In recent years, TINP acquired several mainland properties to further fulfill its mandate of being more easily accessible to all Canadians; to present the beauty of the natural world; to celebrate Canada's legacy and widen its protection of natural and cultural heritage.

The visitor experience potential of TINP's mainland and island properties has yet to be fully realized. In this context, TINP Visitor Experience (VE) is currently under review for the development of a new sustainable offer to fulfill its goals as defined in the upcoming Management Plan. The VE strategy must be prepared using a sustainable tourism approach as defined by the [Global Sustainable Tourism Council \(GSTC\)](#). The offer to be developed must be understood as a first step for the recapitalization of several components of TINP's infrastructure on both island and mainland properties.

###### **Project Objective**

The objectives of this project are to provide planning, facilitation and writing services in order to develop a menu of Visitor Experience options and related products that enable TINP to achieve its mandate and goals. Most specifically, the consultant will assist TINP in developing high-quality experiences with low ecological impact that encourage longer and repeat visits. The offer developed must be part of a long-term strategy for providing access and connecting visitors to meaningful visitor experiences, while protecting & preserving cultural & natural resources, managing visitor use and generating benefits for both local people, indigenous partners and the private industry.

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The project will be executed in eight phases. However, certain steps, as well as parts of certain steps will be completed collaboratively with PCA. The work attribution per steps is clearly identified in section PD 2.3 SCOPE OF WORK AND ASSOCIATED REQUIRED SERVICES of this document.

In performing her/his responsibilities, and during all steps, the consultant will work closely with the PCA project authority (herein referred to as the PA). **The PA will manage all communication within the Agency and its stakeholders.**

Reference Documents:

- i. TINP visitor experience guiding principles
- ii. Parks Canada Agency's vision and guiding principles  
(<https://www.pc.gc.ca/en/docs/pc/poli/princip/sec1/part1b>)
- iii. Global Sustainable Tourism Council Criteria for Destinations (GSTC-D)

Key stakeholders to this project are:

- 1000 Islands Accommodation Partners
- Front of Yonge Township
- Frontenac Arch Biosphere Reserve
- Frontenac Arch Biosphere Foundation
- Leeds & Thousand Islands Township
- St. Lawrence Parks Commission
- The Great Waterway (RTO 9)
- Thousand Islands Watershed Land Trust
- Town of Gananoque Tourism
- Boater community
- Conservation partners
- First Nation - Mohawk of Akwesasne
- First Nation – Mohawk of the Bay of Quinte (Tyendinaga)
- Local Attractions and Recreational Groups
- Government organizations
- Tourism groups
- Educational groups

## PD 2.3 SCOPE OF WORK AND ASSOCIATED REQUIRED SERVICES

The following is the scope of work according to the eight phases. Appendix A contains a heuristic map of the project outlining phases, deliverables, meetings and workshops. Appendix B contains a map of TINP.

### Phase 1 - Preparation

The Consultant shall review all available information and attend an initial meeting with the PA to confirm the project scope, budget and timeline and discuss most suitable methodology. The consultant will propose and explain the project methodology and timeline in a written document. The consultant will perform a data gap analysis of the information provided by PCA and, as required and if internally available, the PA will gather and organize further requested data for the consultant.

Available information for review includes (this information will be shared upon contract award):

- i. 2020 TINP Management Plan (draft)
  - ii. Social Science data from the Visitor Information Program (visitor survey)
  - iii. Prizm Postal Code Analysis (visitor origins and market segmentation)
  - iv. Revenue figures
-

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- v. Attendance stats (per sites)
- vi. Promotion plan
- vii. VE strategic document (on target)
- viii. Interpretive plans
- ix. 2018 TINP Camping Report
- x. 2018 TINP State of the Park Assessment
- xi. Ecological Sensitivity Mapping for Landon Bay and Mallorytown Landing

Deliverable for Phase 1 is:

- i. Project methodology and timeline

PCA will review the consultant's deliverable to provide comments. PCA must approve the final document.

### **Phase 2 - Goals and Vision Confirmation**

The work from this phase will be divided in two sub-phases which have been partially developed by PCA as a preparatory report, as follows:

#### **a. Visitor experience goals**

In sub-phase 1, PCA will provide the consultant with preliminary VE opportunities and goals as developed during the TINP management plan process. The consultant will assist PCA in developing and facilitating a SWOT workshop to confirm and refine the proposed goals according to the project objectives, scope and methodology. The consultant must keep in mind that the outcomes of the SWOT will be later used in development of the action plan.

#### **b. VE Vision Statement**

In sub-phase 2, PCA will provide the consultant with TINP vision elements and a preliminary vision statement that summarizes the essence of the Park. The consultant will formulate recommendations and assist PCA in drafting the final version of the VE vision statement that will frame the development of whole new visitor experience offer.

The consultant's presence is required during the SWOT workshop.

Deliverables for phase 2 are:

- i. Preparation & facilitation of a SWOT workshop
- ii. Drafting of workshop minutes, SWOT analysis and goals formulation
- iii. Drafting of final VE vision statement

PCA will review the consultant's deliverables and provide comments. PCA must approve the final deliverables.

A list of available documents for phase 2:

- i. Draft stakeholder analysis
- ii. TINP Vision elements and draft vision statement
- iii. TINP VE opportunities and goals

### **Phase 3 - Target Market Assessment**

This phase will be divided into three sub-phases.

#### **a. Visitation inventory**

In sub-phase 1, PCA will provide the consultant with all internally available data related to the current/recent visitation profile. The consultant will review, analyse and synthesize the information in writing.

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**b. Regional offer assessment**

In sub-phase 2, the consultant will assist PCA in determining local and regional tourism/ecotourism organization's metrics such as: positioning, priorities, trends, target markets, size, area of operation, market competitiveness, products, life cycle, business model, growth, etc. PCA will collaborate in the gathering of data. The approach retained to complete this task must be outlined in the consultant's preliminary report under methodology. A PESTLE analysis must be included in this phase. The outcomes of this sub-phase will be submitted in a report for review at the 50% and 99% completion stages.

**c. Target market selection and growth strategy**

In sub-phase 3, the consultant will provide PCA with its recommendations on best potential target markets according to growth opportunity, regional offer assessment outcomes and TINP/GSTC guiding principles. The consultant will propose a sustainable growth strategy based on the Ansoff matrix model including an assessment on growth risks related to tourism management. The consultant will provide recommendations and the outcomes of this sub phase in a report. The outcomes of this sub phase will be submitted in a report for review at the 50% and 99% completion stages.

Deliverables for phase 3 are:

- i. Synthesis of current visitation inventory
- ii. Regional offer assessment report (50% & 99% review)
- iii. Draft target market report (50% & 99% review)
- iv. Final target market assessment report

At least one in-person planning meeting will be required during phase 3. PCA will review the consultant's deliverables and provide comments. The deliverables for phases ii & iii must be submitted at 50% & 99% completion. PCA must approve final deliverables.

A list of available documents for phase 3:

- i. TINP current visitation data as outlined phase 1.
- ii. Regional Tourism Organization 9 (RTO9)– State of Tourism 2019
- iii. RTO 9 – Marketing Plan 2019-20
- iv. RTO 9 – Strategic Playbook 2018-2021
- v. RTO 9 – Industry Insights Survey – Summer 2018
- vi. RTO 9 – Master Travel Analytics & Website Metrics

**Phase 4 - VE Assessment**

PCA will provide the consultant with a complete inventory of its current/recent VE offer. The consultant will assist PCA in developing an assessment tool to assess TINP's visitor offer. The tool must integrate visitor experience strategic objectives, proposed target markets, TINP/GSTC guiding principles and relevant considerations from the regional offer assessment.

PCA will provide the consultant with a draft assessment of its current/recent VE offer based on the assessment tool developed. The consultant will provide recommendations on the draft VE assessment and assist PCA in drafting the final report.

Deliverables for phase 4 are:

- i. VE assessment tool
- ii. VE offer assessment report

At least one in-person planning meeting is required during phase 4. PCA will review the consultant's deliverables and provide comments. PCA must approve final deliverables.

A list of available documents for phase 4:

- i. TINP VE inventory as outlined in phase 1.

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### **Phase 5 - Product development**

During this phase, the consultant will assist PCA in crafting site-specific VE vision and associated products for TINP. This phase will be divided in three sub-phases as follows:

a. Development approach

During sub-phase 1, the consultant will assist the PA in developing the most suitable approach to craft a site-specific VE vision and develop new products. This methodology must be based on the outcomes of the preceding phases and address TINP specific features: the fragmented nature of the park and the dispersed nature of its facilities, the current very limited offer at most locations, the ecological concerns, the intent of TINP's VE redevelopment as outlined in TINP/GSTC guiding principles, the strong integration of indigenous partners in a collaborative approach, as well as the necessity to integrate the new Management Plan's targets and goals.

b. Investigation

During sub-phase 2, the consultant will assist the PA in performing all necessary research related to sustainable tourism product development including adventure based tourism as outlined during development approach (5a). Research targeting geographically dispersed and shoulder month visitation must be explored. The outcomes of this sub-phase will provide ideas and inspiration for the sub-phase 5c: brainstorming session. PCA staff will undertake 50% of the research task in a collaborative approach. The consultant will be responsible to assemble and organize all information in a report.

c. Brainstorming

During sub-phase 3, the consultant will assist the PA in prepping and facilitating a brainstorming workshop to develop the site-specific VE vision and corresponding new site specific offers. The consultant will outline the outcomes of the session in a report and provide recommendations. The outcomes of this sub-phase will be submitted in a report for review at the 50% and 99% completion stages.

### **Optional Service**

If deemed necessary, the consultant will assist the PA in developing and facilitating site-specific visits. This task must be priced as optional services.

At least two in-person planning meetings are required during phase 5. The consultant must also attend the brainstorming workshop.

Deliverables for phase 5 are:

- i. Site-specific methodology
- ii. Investigation report
- iii. Preparation and facilitation of brainstorming session
- iv. Brainstorming workshop minutes and report
- v. Final Product Development report (50 % & 99% review)

PCA will review the consultant's deliverables and provide comments. PCA must approve final deliverables.

A list of available documents for phase 5:

- i. TINP revised management plan
- ii. TINP management plan - consultation report

### **Phase 6 - Offer Evaluation and Implementation Plan**

This phase is divided in two sub-phases as follows:

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### Implementation plan development

In sub-phase 1, the consultant will assist PCA in developing an action plan for potential VE offer retained following phase 5 including, but not limited to, location considerations, market specificities, preliminary timeline, regional alignment, potential impacts, alternative transportation options, operational and financial considerations, performance indicators, as well as partnership development and third party business opportunities, including first nations as primary partners. The SWOT and PESTLE will inform the process. The outcomes of the implementation plan will inform the feasibility of proposed options. This phase also includes updating the stakeholder analysis.

### Evaluation tool

The consultant will assist PCA in developing an evaluation tool to rank and support the prioritization of VE offer implementation. The evaluation tool must consider feasibility as outlined in the implementation plan and be based on TINP/GSTC guiding principles, the retained growth strategy (Ansoff Matrix) as well as the revised management plan & corresponding consultation outcomes<sup>1</sup>. The PA will lead the assessment process alongside with PCA staff. The consultant will provide assistance and recommendations during the evaluation process and compile the outcomes in a report.

### Visitor Management

The consultant will assist PCA in developing a visitor management strategy for the retained offers/sites as established following the evaluation process. The strategy must provide a framework to avoid and mitigate the undesirable impacts of tourism including setting limits of acceptable changes and corresponding indicators.

The proposed strategy must provide guidance to TINP in maximizing benefits for visitors while achieving and maintaining desired natural and cultural resource conditions as outlined in the Interagency Visitor Use Management Council.

Deliverables for phase 6 are:

- i. Implementation Plan (50% & 99% review)
- ii. Evaluation tool & recommendations
- iii. Visitor Management Strategy (50% & 99% review)

At least two in-person meetings will be required during phase 6. The outcomes of phase 6i & iii will be submitted in a report at 50% and 99% completion. PCA will review the consultant's deliverables and provide comments. PCA must approve final deliverables.

A list of available documents for phase 5:

- i. Ecological zoning and data
- ii. Northern Bruce Peninsula Sustainable Tourism Management Plan: Recommendations for Consideration
- iii. Visitor Use Management Framework – Interagency Visitor Use Management Council.

### **Phase 7 - Final report**

Upon completion and approval of the VE offer evaluation report, the consultant will assemble and synthesize the material developed during phase 1 to 6 into a final document. The outcomes of this phase will be submitted at 50% and 99% completion for PCA review.

Deliverables for phase 7 are:

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<sup>1</sup> The management plan is currently being drafted and extensive consultations with various stakeholders are scheduled in 2019. The revised draft management plan as well consultation outcomes must be integrated throughout this project. TINP guiding principles could be updated accordingly.

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- i. Draft VE Strategy (50% and 99% review)
- ii. VE strategy – Final Report

At least one in-person meeting will be required during phase 7. PCA will review the consultant's deliverables and provide comments. PCA must approve final deliverables.

### **Phase 8 - Visual and promotional content development**

This phase is divided in two sub-phases as follows:

#### Engagement & outreach

In sub-phase 1, the consultant will assist PCA in positioning TINP to its target markets with respect to TINP/GSTC guiding principles by proposing a set of tactics based on target market knowledge and features. The strategy must encourage responsible visitor conduct as well as raising regional awareness. The outcomes of this sub phase will be submitted at 50% and 99% completion for PCA review.

#### Visual support

The consultant will assist the PA in developing visual storytelling content such as sketches and conceptual landscape drawings related to the VE offers to be implemented. The material developed will inform PCA stakeholders on TINP recapitalization initiatives and support future design.

Deliverables for phase 8 are:

- i. Engagement & outreach strategy (50 & and 99% review)
- ii. Visual supporting material (as required)

At least one in-person meeting will be required during phase 8. PCA will review the consultant's deliverables and provide comments. PCA must approve final deliverables.

### **PD 2.4 SUMMARY OF CONSULTANT TEAM EXPERTISE**

From the scope of work, Parks Canada requires the Consultant to have the following capacities:  
i) Development of products for the ecotourism industry ii) Marketing research & analysis iii) Business development iv) Workshop preparation & facilitation v) Strategic planning vi) Graphic design vii) Land use planning and/or landscaping.

### **PD 2.5 CONSTRAINTS AND CHALLENGES**

Challenges related to this work include information and resource availabilities, as well as rigorous time management.

### **PD 2.6 PROJECT DELIVERY APPROACH**

The agile project management approach will be used. The PA will manage all communication within the Agency.

### **PD 2.7 REQUIRED SERVICES**

The following list of Required Services are the overall Consultant services, which may be required to deliver this project. Refer to PD 2.3 SCOPE OF WORK AND ASSOCIATED REQUIRED SERVICES for additional description.

Phase 1 - Preparation (one in person meeting required plus workshop)

Phase 2 - Goals and Vision Confirmation

Sub-phase 1 - VE Goals including SWOT workshop



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- Sub-phase 2 - Vision Statement
- Phase 3 - Target Market Assessment (one in person meeting required)
  - Sub-phase 1 - Visitation inventory
  - Sub-phase 2 - Regional offer assessment
  - Sub-phase 3 - Target market selection and growth strategy
- Phase 4 - VE Assessment (one in person meeting required)
- Phase 5 - Product Development (two in person meetings required plus session)
  - Sub-phase 1 - Development approach
  - Sub-phase 2 - Investigation
  - Sub-phase 3 - Brainstorming
  - \*Optional Site Specific Assessment (if required)
- Phase 6 - Action Plan and Offer Evaluation (two in person meetings required)
  - Sub-phase 1 - Action Plan Development
  - Sub-phase 2 - Evaluation tool
  - Sub-Phase 3 – Visitor Management Strategy
- Phase 7 Final Report (one in person meeting required)
- Phase 8 Visual and Promotional Content Development (one in person meeting required)
  - Sub-phase 1 - Engagement Strategy
  - Sub-phase 2 - Visual supporting material

## PD 2.8 SCHEDULE

To meet project milestones, the Consultant will require a team of experts who are knowledgeable in this scope of work and maintain schedule control during each phase. The plan and capability to meet these project milestones is to be presented in the Consultant's proposal.

1. The consultant shall prepare an overall schedule outlining duration of all phases, timelines and milestones respecting Parks Canada Agency's schedule requirements.
2. Schedule must clearly define the anticipated start and finish date of the project.
3. The consultant shall update the project schedule monthly with details based on verifiable progress.
4. The consultant must advise Parks Canada Agency if it appears that the Project schedule may vary from the approved project schedule.

**Phase 1 to 7** of the project must be completed **no later than March 31, 2020**.

**Phase 8** must be completed no later than **May 31, 2020**.

## PD 2.9 EXECUTION

1. Meetings

The consultant project leader must chair and produce minutes for regular project meetings with Parks Canada Agency Project Manager during the execution phases. The kick off and closure meetings are chaired by the Parks Canada Agency Project Manager.

Several in person meetings are mandatory as described in PD 2.3 SCOPE OF WORK AND ASSOCIATED REQUIRED SERVICES. PCA meeting facilities are located in Mallorytown and Kingston, ON. PCA is open to using the consultant facilities depending on location.

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The consultant must provide a location to host the meetings that satisfies Parks Canada Agency requirements and standards. The location must be approved by the Parks Canada Agency Project Manager. Meetings will be held as defined in this Statement of Work. Parks Canada Agency Project Manager is entitled to call additional meetings if judged necessary.

2. Cost Management and Accounting

- a. The Consultant must update project cash flow forecasts monthly in accordance with the Contract value.

**PD 2.10 EXISTING DOCUMENTATION**

The existing documents provided by Parks Canada for this project are to be treated as reference material. Parks Canada cannot ensure their completeness and accuracy. As such, the Consultant is responsible to review and confirm all information.

**PD 2.11 WORK NOT INCLUDED IN THIS STATEMENT OF WORK**

Not forming part of the work under this project are:

- i. Data collection within PCA;
- ii. Stakeholder consultation processes;
- iii. Communication plan;
- iv. Marketing plan.

**PROJECT ADMINISTRATION**

**PA 1 PROJECT ADMINISTRATION**

**PA 1.1 GENERAL**

The following administrative requirements apply during all phases of the project delivery.

**PA 1.2 PARKS CANADA PROJECT MANAGEMENT**

- .1 The Project Authority assigned to the project is also the Departmental Representative.
- .2 The Departmental Representative is directly concerned with the project and responsible for its progress on behalf of Parks Canada.
- .3 The Departmental Representative is the liaison amongst and between the Consultant, and Parks Canada.
- .4 Parks Canada administers the project and exercises continuing control over the project during all phases.
- .5 Unless directed otherwise by the Project Authority, the Consultant obtains all Federal requirements and approvals necessary for the work from the Project Authority.

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Laura Lowson

**Client Ref. No. - N° de réf. du client :**  
N/A

**Title – Titre :**  
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National Park – Mallorytown Landing

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### **PA 1.3 LINES OF COMMUNICATION**

.1 Unless otherwise directed by Parks Canada Departmental Representative, all project communication will be conducted through the Parks Canada Departmental Representative.

.2 Contact between the Consultant and the Parks Canada personnel shall be through the Parks Canada Departmental Representative. Direct communication between members of the Parks Canada Project Team on routine matters is required to enable the discussion and resolution of technical issues.

### **PA 1.4 MEDIA**

.1 The Consultant shall not respond to requests for project-related information or questions from the media. Such inquiries are to be directed to the Departmental Representative.

### **PA 1.5 GENERAL PROJECT DELIVERABLE**

.1 Where deliverables and submissions are required, they shall be submitted in accordance to this Statement of Work. All documents must be submitted in a format acceptable to the Parks Canada Project Manager.

### **PA 1.6 ACCEPTANCE OF PROJECT DELIVERABLES**

.1 Written deliverables must be submitted in English electronically to the Departmental Representative in a document that is open for editing.

.2 Acceptances indicate that based on a general review of material for specific issues, the material is considered to comply with governmental and departmental objectives and practices, and that overall project objectives are being satisfied.

.3 Parks Canada acceptances do not prohibit later rejection of work that is determined to be unsatisfactory at later stages of review.

.4 Acceptances by other agencies and levels of government may be required to supplement Parks Canada acceptances. The Consultant shall assist the Departmental Representative in securing all such acceptances and adjust all documentation as required by such authorities when securing acceptance.

### **PA 1.7 MEETINGS**

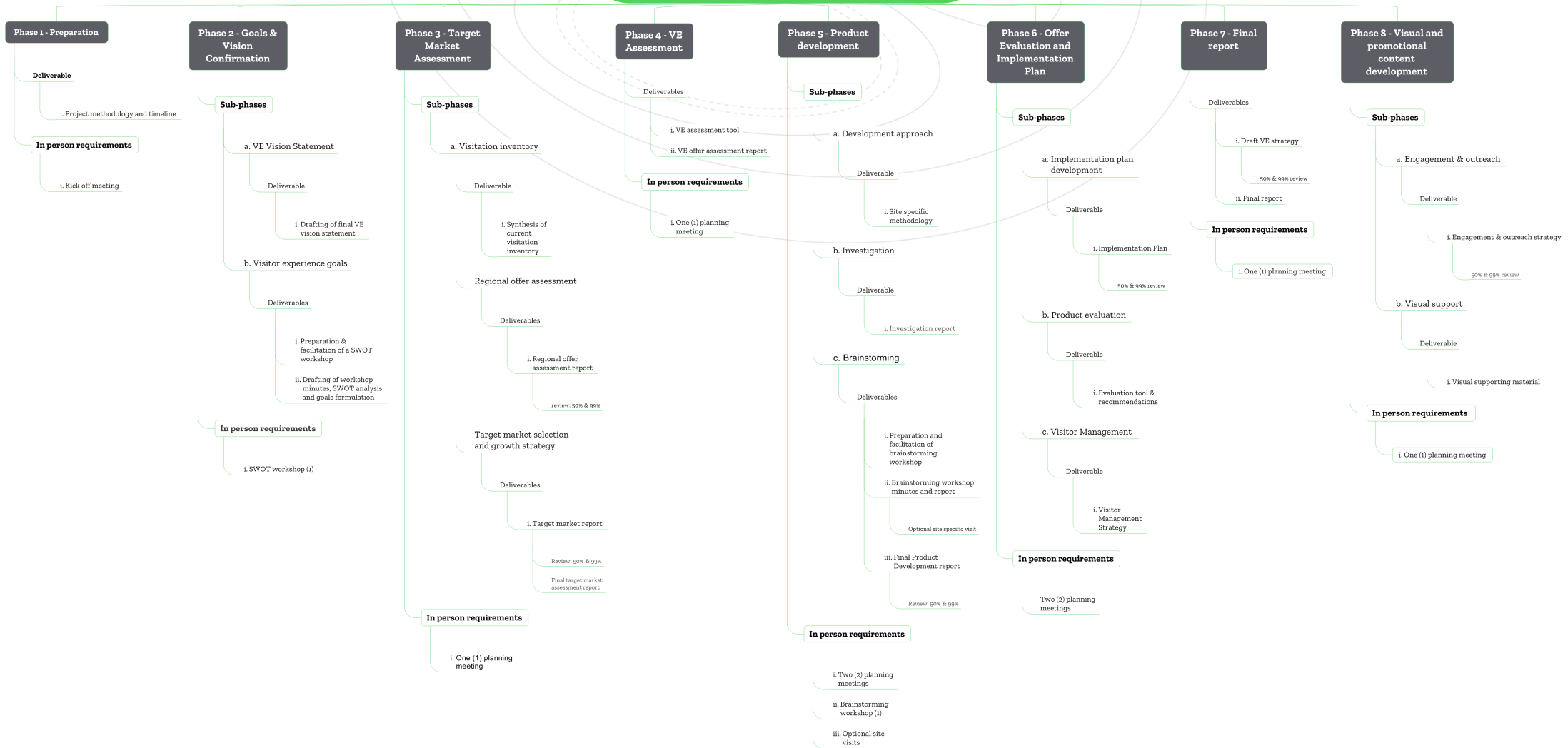
.1 The Departmental Representative shall arrange in-person meetings on an if-and-when needed basis. Mandatory in-person meetings are listed in section PD 2.3 SCOPE OF WORK AND ASSOCIATED REQUIRED SERVICES. Conference calls will be held otherwise.

.2 During all phases, the Consultant will attend the meetings, record the issues and decisions, and prepare and distribute minutes within three working days of the meeting.

# APPENDIX A

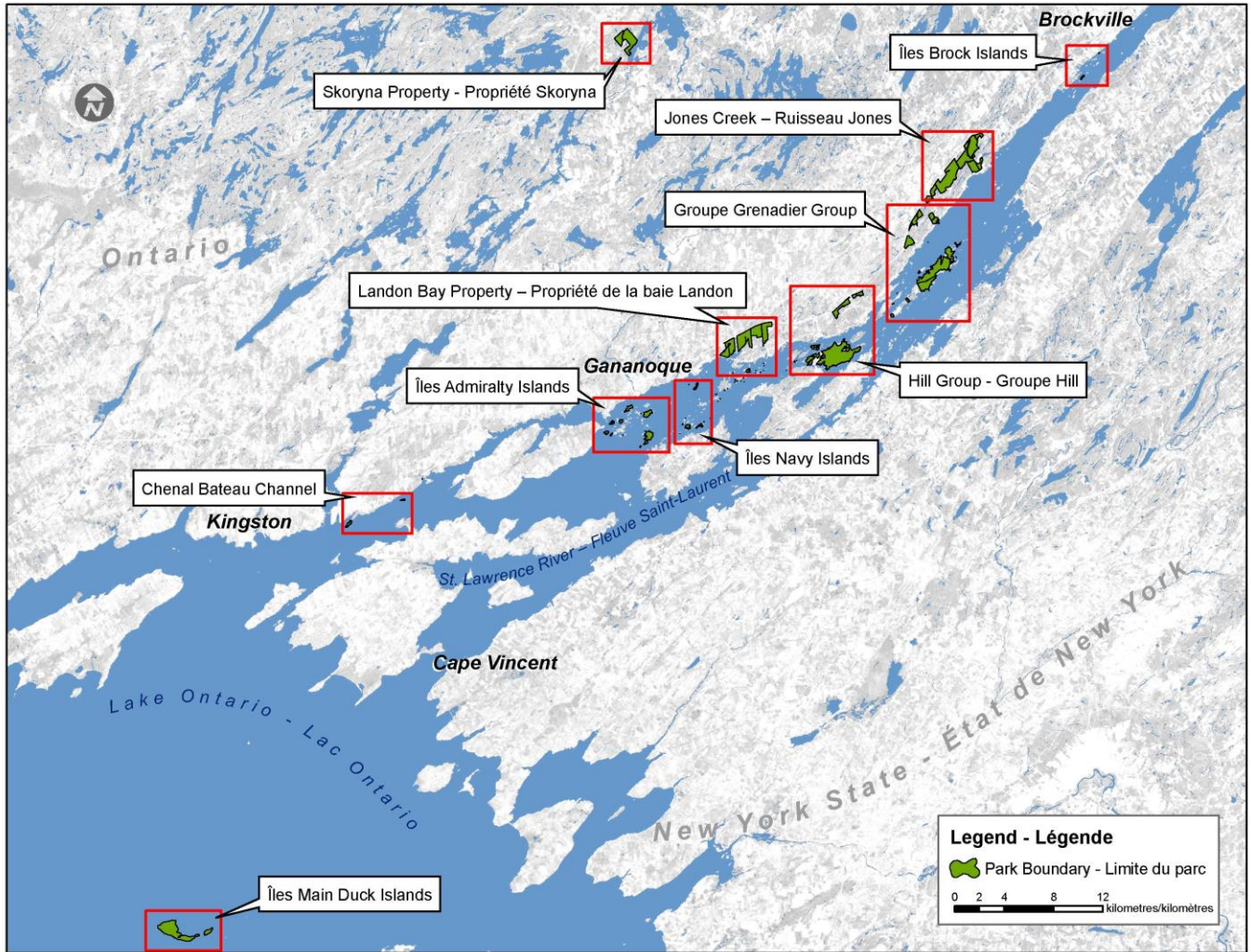


## Visitor Experience Strategy & Associated Infrastructure Planning



## Appendix B

### THOUSAND ISLANDS NATIONAL PARK



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## ANNEX B

### BASIS OF PAYMENT

Bidders must provide pricing in the format specified in this Annex B – Basis of Payment. Failure to provide prices in the format specified will render the quotation non-responsive.

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid firm prices (including but not limited to all labour, materials, travel and disbursements), as specified below.

**Goods and Services Tax (GST) or Harmonized Sales Tax (HST) is extra, if applicable.** The quotation is to be in **Canadian dollars**.

<b>Contract Period: Contract Award to May 31, 2020</b>				
<b>Item</b>	<b>Description</b>	<b>Unit of Measure</b>	<b>Total Cost</b>	
1	Phase 1 - Preparation	Lump Sum	\$	
2	Phase 2 - Goals and Vision Confirmation	Lump Sum	\$	
3	Phase 3 - Target Market Assessment	Lump Sum	\$	
4	Phase 4 - VE Assessment	Lump Sum	\$	
5	Phase 5 - Product development	Lump Sum	\$	
6	Phase 6 - Offer Evaluation and Implementation Plan	Lump Sum	\$	
7	Phase 7 - Final report	Lump Sum	\$	
8	Phase 8 - Visual and promotional content development	Lump Sum	\$	
<b>Total (excluding Applicable Taxes)</b>			<b>\$</b>	
<b>Optional Service – Annex A PD 2.3 Scope of Work and Associated Required Services, Phase 5 – Product Development section c)</b>				
<b>Item</b>	<b>Description</b>	<b>Estimated Days</b>	<b>Firm Rate</b>	<b>Extended Price</b>
1	Project Leader – all inclusive firm rate	2	\$	\$
2	Sustainable Tourism Specialist – all inclusive firm rate	2	\$	\$
3	Planner – all inclusive firm rate	2	\$	\$
4	Graphic Designer – all inclusive firm rate	2	\$	\$
<b>Total (excluding Applicable Taxes)</b>				<b>\$</b>
<b>Total Evaluated Price (Contract Period + Optional Service) excluding applicable taxes</b>				<b>\$</b>

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**ANNEX C**

**ATTESTATION AND PROOF OF COMPLIANCE WITH OCCUPATIONAL HEALTH AND SAFETY (OHS)**

*The following form must be completed and signed prior to commencing work on Parks Canada Sites.*

**Submission of this completed form, satisfactory to Parks Canada, is a condition of gaining access to the work place.**

Parks Canada recognizes that federal OHS legislation places certain specific responsibilities upon Parks Canada as owner of the work place. In order to meet those responsibilities, Parks Canada is implementing a contractor safety regime that will ensure that roles and responsibilities assigned under Part II of the *Canada Labour Code* and the *Canada Occupational Health and Safety Regulations* are implemented and observed when involving contractor(s) to undertake works in Parks Canada work places.

<b>Parks Canada Responsible Authority/Project Lead</b>	<b>Address</b>	<b>Contact Information</b>
<b>Project Manager/Contracting Authority</b>		
<b>Prime Contractor</b>		
<b>Subcontractor(s)</b> (add additional fields as required)		

<b>Location of Work</b>
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<b>General Description of Work to be Completed</b>
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**Mark “Yes” where applicable.**

	A meeting has been held to discuss hazards and access to the work place and all known and foreseeable hazards have been identified to the contractor and/or subcontractor(s)
	The contractor and/or its subcontractor(s) will comply with all federal and provincial/territorial legislation and Parks Canada's policies and procedures, regarding occupational health and safety.
	The contractor and/or its subcontractor(s) will provide all prescribed safety materials, equipment, devices and clothing.
	The contractor and/or its subcontractor(s) will ensure that its employees are familiar with and use all prescribed safety materials, equipment, devices and clothing at all times.
	The contractor and/or its subcontractor(s) will ensure that its activities do not endanger the health and safety of Parks Canada employees.
	The contractor and/or its subcontractor(s) has inspected the site and has carried out a hazard assessment and has put in place a health and safety plan and informed its employees accordingly, prior to the commencement of the work.
	Where a contractor and/or its subcontractor(s) will be storing, handling or using hazardous substances in the work place, it will place warning signs at access points warning persons of the presence of the substances and any precautions to be taken to prevent or reduce any hazard of injury or death.
	The contractor and/or its subcontractor(s) will ensure that its employees are instructed in respect of any emergency procedures applicable to the site.

I, \_\_\_\_\_ (contractor), certify that I have read, understood and attest that my firm, employees and all sub-contractors will comply with the requirements set out in this document and the terms and conditions of the contract.

**Name**

**Signature**

**Date**



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## ANNEX D to PART 5 OF THE BID SOLICITATION

### FORMER PUBLIC SERVANT

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, 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.

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

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

#### Former Public Servant in Receipt of a Pension

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

If so, the Bidder must provide the following information, for all FPSs 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](#).

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### **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.

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## ANNEX E to PART 5 OF THE BID SOLICITATION

### LIST OF NAMES FOR INTEGRITY VERIFICATION FORM

#### Requirements

Section 17 of the [Ineligibility and Suspension Policy](#) (the Policy) requires suppliers, regardless of their status under the Policy, to submit a list of names when participating in a procurement process. The required list differs depending on the bidder or offeror's organizational structure:

- Suppliers including those bidding as joint ventures, whether incorporated or not, must provide a complete list of the names of all current directors.
- Privately owned corporations must provide a list of the owners' names.
- Suppliers bidding as sole proprietors, including sole proprietors bidding as joint ventures, whether incorporated or not, must provide a complete list of the names of all owners.
- Suppliers that are a partnership do not need to provide a list of names.

Suppliers may use this form to provide the required list of names with their bid or offer submission. Failure to submit this information with a bid or offer, where required, will render a bid or offer non-responsive, or the supplier otherwise disqualified for award of a contract or real property agreement. Please refer to [Information Bulletin: Required information to submit a bid or offer](#) for additional details.

#### Supplier Information

<b>Supplier's Legal Name:</b>		
<b>Organizational Structure:</b> ( ) Corporate Entity ( ) Privately Owned Corporation ( ) Sole Proprietor ( ) Partnership		
<b>Supplier's Legal Address:</b>		
<b>City:</b>	<b>Province / Territory:</b>	<b>Postal Code / ZIP Code:</b>
<b>Supplier's Procurement Business Number (optional):</b>		

#### List of Names

Name	Title

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**Declaration**

I, (name) \_\_\_\_\_, (position) \_\_\_\_\_, of

(supplier's name) \_\_\_\_\_, declare that the information provided in this Form is, to the best of my knowledge and belief, true, accurate and complete. I am aware that failing to provide the list of names will render a bid or offer non-responsive, or I will be otherwise disqualified for award of a contract or real property agreement. I am aware that during the bid or offer evaluation stage, I must, within 10 working days, inform the contracting authority in writing of any changes affecting the list of names submitted. I am also aware that after contract award I must inform the Registrar of Ineligibility and Suspension within 10 working days of any changes to the list of names submitted.

---

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Please include with your bid or offer.

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N/A

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## ANNEX F

### TECHNICAL EVALUATION

#### Mandatory Technical Criteria

The bid must meet the mandatory requirements specified below. The Bidder must provide the necessary documentation to support compliance with each requirement.

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

	Met/ Not Met	Cross Reference
<p><b>M.1 EXPERIENCE OF KEY PERSONNEL</b></p> <p>Submit a curriculum vitae for all 4 mandatory team members to address the following requirements. A same individual can occupy a maximum of two positions if meeting the requested requirements of experience for both positions.</p> <p><b>M.1.1 PROJECT LEADER (max 2 pages)</b> Significant experience (minimum 5 years' experience within the last 10 years) <b>working WITH or FOR the tourism industry</b> in disciplines and/or specialties that include preferably, but are not limited to: project management, sustainable tourism assessment, development and management, sustainability destination strategies, action plan development and implementation.</p> <p><b>M.1.2 SUSTAINABLE TOURISM SPECIALIST (max 2 pages)</b> Significant experience (minimum 5 years' experience within the last 10 years) <b>working WITH or FOR the tourism industry</b> in disciplines and/or specialties that include preferably, but are not limited to: participatory planning approaches, marketing research, analysis &amp; segmentation, interpretation and educational programming; experiential programming; visitor / client services and operations; sustainable product development and promotion.</p> <p><b>M.1.3 PLANNER (Max 2 pages)</b> Significant experience (minimum 3 years' experience within the last 10 years) <b>working in strategic and/or environmental land use planning</b> in disciplines and/or specialties that include preferably, but are not limited to the preparation of land use plans for sites such as wildlife/nature preserves, protected lands, national and provincial parks, watershed protection and/or the preparation of land use plans and/or landscaping plans for campgrounds and/or other recreational sites.</p> <p><b>M.1.4 GRAPHIC DESIGNER (Max 2 pages)</b> Significant experience (minimum 3 years' experience within the last 5 years) <b>working in the creation of original visual content</b> illustrating activities, events and/or concepts using graphic design technical skills such as image color correction, photo editing, image formats sizing and conversions, resolutions, alpha channels, layering, masking, vector graphic illustration and manipulation, text layout &amp; effects, typography and illustration and knowledge of the Adobe Creative Suite (Illustrator, Photoshop, InDesign, and Acrobat).</p>		

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## M.2 BIDDER'S PORTFOLIO

Submit a **portfolio** of work that contains **two (2) projects within the last ten (10) years** that reflects the following requirements and their relevance to the breadth of requirements described in M1 and the Term of References herein. For clarity, the projects must be completed prior to the closing date of this RFP. The experience described must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger or joint venture but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered. Each project is limited to 1 page each, for a total of up to 2 pages.

Describe and explain how the project scope is related to the **research, analysis, and/or planning in support of development and management of sustainable tourism.**

Describe and explain how project activities are related to the planning **and facilitation of working group sessions** in relation to **sustainable tourism, ecotourism, environmental protection & conservation and/or sustainable land use.**

Describe and explain how the project objectives are related to **development and writing of client-focused based reports and implementation plans** in relation with **sustainable tourism, ecotourism, environmental protection & conservation and/or sustainable land use.**

Describe the bidder's role and responsibilities in each project presented and explain their relevance to the requirements herein and Parks Canada's mandate and sites.

## M.3 PROJECT MANAGEMENT EXPERIENCE

Provide a **detailed description of two (2) completed projects within the last ten (10) years** (different from the projects included in the portfolio from requirement M2) that reflect the breadth of requirements described in the Statement of Work herein and that include the elements listed below. For clarity, the projects must be completed prior to the closing date of this RFP. The experience described must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger or joint venture but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered. Each project is limited to 3 pages each, for a total of up to 6 pages.

Provide a **description of the project** including objectives, scope, and justification regarding retained research/analysis/development methodology as well as delivery strategy.

Provide **project's start and completion dates and total value.** Clearly indicate which elements of the project are comparable to the project in this RFP.

Describe **bidder's role** in the project, its **process**, the project **outputs** and **outcomes**, and how the bidder's work **supports the client expectations** in achieving the project goals.

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<p>Describe how the <b>scope and risks</b> were managed. Describe how scope creep was managed in regards to schedule and budget expectations.</p> <p>Describe how the <b>budget &amp; schedule</b> were managed and controlled to fully achieve project objectives (i.e. explain the variances between the prices set out in the contract and the final cost; provide initial schedule and revised schedule, with explanation to address variances).</p> <p>Describe how <b>quality</b> and <b>stakeholders</b> were managed to achieve client expectations and meet project objectives.</p> <p>Describe proposed <b>follow up</b> and <b>evaluation strategy</b> to ensure successful project implementation.</p>		
<p><b>M.4 UNDERSTANDING OF THE PROJECT</b></p> <p>Submit a <b>project proposal</b> demonstrating the Bidder's understanding of the Project that will shape the end product. The proposal must include the following elements and is limited to a total of 5 pages.</p> <p>Description of the <b>project scope, goals, constraints, challenges</b> with highlights of those that are particularly significant;</p> <p>Description of the Consultant's <b>methodology</b> to meet the intent of the project and Parks Canada expectations;</p> <p>Description of the <b>retained approach to manage key issues</b> to be dealt with during the project such as:</p> <ul style="list-style-type: none"><li>• Scope &amp; quality;</li><li>• Resources;</li><li>• Communication;</li><li>• Stakeholders;</li><li>• Schedule;</li><li>• Budget.</li></ul> <p>Demonstration of <b>adherence to Parks Canada's project intent</b>:</p> <ul style="list-style-type: none"><li>• Understanding of sustainable tourism four key principles;</li><li>• Development of high-quality and connecting experiences that encourage longer and repeat visits;</li><li>• Protection &amp; preservation of cultural &amp; natural resources;</li><li>• Sustainable management of visitor use;</li><li>• Generation of benefits for both local people, indigenous partners and the private industry;</li><li>• Encouragement of environmental and cultural awareness and respect;</li><li>• Recognition of rights and spiritual beliefs of the Indigenous People and stimulation of partnerships to create empowerment and opportunities.</li></ul> <p>Demonstration of <b>knowledge and understanding of Thousand Islands region</b> including but not limited to tourism/ecotourism industries, stakeholders, opportunities and challenges.</p>		

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<p><b>M.5 MANAGEMENT OF TEAM</b></p> <p>Provide <b>supporting material</b> demonstrating the Bidder's capacity to manage the project team, ensure consistency and communication efficiency including the following elements. The supporting material is limited to a total of 2 pages.</p> <p>Provide an <b>organizational chart</b> clearly identifying all personnel to be involved in this project including position titles and names.</p> <p>Clearly identify the <b>roles</b> and <b>responsibilities</b> for each personnel;</p> <p>Describe how <b>reporting relationships</b> within the consultant's team, Parks Canada and external stakeholders will be managed;</p> <p>Describe the <b>communication approach</b> for providing updates to and coordinating work with Parks Canada during all project phases.</p>		
<p><b>M.6 MANAGEMENT OF SERVICES AND WORK</b></p> <p>Provide <b>supporting material</b> describing how the firm proposes to perform the services and deliver the Work while respecting the project constraints including the following elements. The supporting material is limited to a total of 2 pages.</p> <p>Submit a <b>preliminary schedule</b> (Gantt chart) containing all phases, corresponding deliverables and identify key milestones. The schedule must highlight what activities can be performed simultaneously and estimated time to complete each task.</p> <p>Specify the <b>resources</b> to be allocated for each phase;</p> <p>Describe the <b>quality control strategy</b>; explain how the control will be applied throughout the delivery of the Project.</p>		



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**Point Rated Technical Criteria**

	SCORE	WEIGHT	MAXIMUM MARK
<b>R.1 EXPERIENCE OF KEY PERSONNEL</b>			
<b>Evaluation of M.1.1 PROJECT LEADER</b>			
a) Quality & relevance of demonstrated experience, accreditation and education in managing projects related to the tourism industry.	10	1	10
<b>Evaluation of M.1.2 SUSTAINABLE TOURISM SPECIALIST</b>			
a) Quality & relevance of demonstrated experience, accreditation and education in leading projects related to the sustainable tourism.	10	1	10
<b>Evaluation of M.1.3 PLANNER</b>			
a) Quality & relevance of demonstrated experience, accreditation and education in strategic and/or environmental planning related to sustainable land use planning.	10	1	10
<b>Evaluation of M.1.4 GRAPHIC DESIGNER</b>			
a) Quality & relevance of demonstrated experience, accreditation and education related to the creation of sketches and images.	10	1	10
<b>Must achieve 24/40 Subtotal R.1</b>			40
<b>R.2 BIDDER'S PORTFOLIO</b>			
<b>Evaluation of M2</b>			
a) Quality & comprehensiveness of presented projects.	10	1.5	15
b) Clarity of bidder's role in the project, its process, outputs and outcomes. More specifically, how the bidder's contributions contributed to the project outcome and success.	10	1.5	15
c) Relevance of presented project to the requirements herein and Parks Canada's mandate and sites.	10	2	20
<b>Must achieve 30/50 Subtotal R.2</b>			50

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<b>R.3 PROJECT MANAGEMENT EXPERIENCE</b>			
<b>Evaluation of M.3</b>			
<b>Project 1</b>			
a) Project relevance to the scope described in the Statement of Work herein and comprehensiveness of project description.	10	2	20
b) Quality of project description and justification including scope, objectives, methodology and delivery strategy. Initial and final budgets and dates are clearly stated.	10	2	20
c) Relevance of the bidder's involvement in the project & quality of project delivery related to client's expectations and objectives.	10	1.5	15
d) Quality of scope and risk management including scope creep management to meet schedule and budget expectations.	10	2	10
e) Controls and management of budget and schedule are clearly defined and appropriate.	10	1	10
f) A strategy to obtain quality and meet stakeholder's expectations is clearly defined and appropriate.	10	1	10
g) A follow up and evaluation strategy to ensure project's successful implementation is clearly defined and appropriate.	10	1.5	15
<b>Must achieve 60/100 Subtotal R.3 - Project 1</b>			100
<b>Project 2</b>			
a) Project relevance to the scope described in the Statement of Work herein and comprehensiveness of project description.	10	2	20
b) Quality of project description and justification including scope, objectives, methodology and delivery strategy. Initial and final budgets and dates are clearly stated.	10	2	20
c) Relevance of the bidder's involvement in the project & quality of project delivery related to client's expectations and objectives.	10	1.5	15
d) Quality of scope and risk management including scope creep management to meet schedule and budget expectations.	10	2	10
e) Controls and management of budget and schedule are clearly defined and appropriate.	10	1	10
f) A strategy to obtain quality and meet stakeholder's expectations is clearly defined and appropriate.	10	1	10
g) A follow up and evaluation strategy to ensure project's successful implementation is clearly defined and appropriate.	10	1.5	15
<b>Must achieve 60/100 Subtotal R.3 - Project 2</b>			100
<b>R.4 UNDERSTANDING OF THE PROJECT</b>			

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National Park – Mallorytown Landing

<b>Evaluation of M.4</b>			
a) Quality of demonstrated understanding of project scope, goals, constraints, challenges with highlights on those that are particularly significant.	10	3	30
b) Quality of the bidder's proposed methodology to meet the intent of the project and Parks Canada's expectations.	10	3	30
c) Relevance, comprehensiveness and quality of the retained approach to manage key issues.	10	2	20
d) Level of adherence to Parks Canada project intent.	10	4	40
e) Quality and relevance of demonstrated knowledge and understanding of the Thousand Islands region related but not limited to tourism/ecotourism industries, stakeholders, opportunities and challenges.	10	2	20
<b>Must achieve 84/140 Subtotal R.4</b>			140
<b>R.5 MANAGEMENT OF TEAM</b>			
<b>Evaluation of M.5</b>			
a) Quality and exhaustivity of the organizational chart including a clear description of roles and responsibilities.	10	1	10
b) Quality of reporting relationships framework definition and efficiency.	10	1	10
c) Relevance and efficiency of proposed communication approach.	10	1	10
<b>Must achieve 18/30 Subtotal R.5</b>			30
<b>R.6 MANAGEMENT OF SERVICES AND WORK</b>			
<b>Evaluation of M.6</b>			
a) Quality and comprehensiveness of schedule management throughout the delivery of the Project.	10	1	10
b) Quality and exhaustivity of provided preliminary schedule.	10	1	10
c) Efficacy of resource allocation for each phase.	10	1	10
d) Relevance and comprehensiveness of quality control strategy.	10	1	10
<b>Must achieve 24/40 Subtotal R.6</b>			40
<b>Must achieve 300/500 Total</b>			500

Scoring Grids:

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The following scoring grids will be used to evaluate the corresponding rated criteria.

**R1 - EXPERIENCE OF KEY PERSONNEL**

<b>Points</b>	<b>Rating Level</b>
0	Did not submit information which could be evaluated.
1-2: inadequate	Bidder do not possess qualifications and experience. The team proposed is not likely able to meet requirements.
3-4: weak	Bidder lacks qualifications and experience. The team does not cover all components or overall experience is weak.
5-6: adequate	Bidder has an acceptable level of qualifications and experience. The team covers most components and will likely meet requirements.
7-8: fully satisfactory	Bidder is qualified and experienced. The team covers all components - some members have worked successfully together.
9-10: strong	Bidder is highly qualified and experienced. Strong team - has worked successfully together on comparable projects.

**R2 - BIDDER'S PORTFOLIO and R3 - PROJECT MANAGEMENT EXPERIENCE**

<b>Points</b>	<b>Rating Level</b>
0	Did not submit information which could be evaluated.
1-2	Sample projects are not related to the listed requirements.
3-4	Sample projects are generally not related to the listed requirements.
5-6	Sample projects are generally related to the listed requirements.
7-8	Sample projects are directly related to the listed requirements.
9-10	Sample projects exemplified the listed requirements.

**R4 - UNDERSTANDING OF THE PROJECT; R5 - MANAGEMENT OF TEAM; R6 - MANAGEMENT OF SERVICES AND WORK**

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<b>Points</b>	<b>Rating Level</b>
0	Did not submit information which could be evaluated.
1-2	Lacks complete or almost complete understanding of the project intend and requirements. Extremely poor, insufficient to meet performance requirements. Weaknesses cannot be corrected.
3-4	Has some understanding of the requirements but lacks adequate understanding in some areas of the project intend and requirements. Little capability to meet performance requirements Generally doubtful that weaknesses can be corrected.
5-6	Demonstrates a good understanding of the project intend and requirements. Acceptable capability, should ensure adequate results. Weaknesses can be corrected.
7-8	Demonstrates a very good understanding of the project intend and requirements. Satisfactory capability, should ensure effective results. No significant weaknesses.
9-10	Demonstrates an excellent understanding of the project intend and requirements. Superior capability, should ensure very effective results. No apparent weaknesses.