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K1A 0S5

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Revision to a Request for a Standing Offer

Révision à une demande d'offre à commandes

Departmental Individual Standing Offer (DISO)

Offre à commandes individuelle du département(OCID)

The referenced document is hereby revised; unless otherwise indicated, all other terms and conditions of the Offer remain the same.

Ce document est par la présente révisé; sauf indication contraire, les modalités de l'offre demeurent les mêmes.

Comments - Commentaires

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication
360 Albert St./ 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

Title - Sujet Public Engage. / Consult. Services	
Solicitation No. - N° de l'invitation EN578-181138/C	Date 2019-09-12
Client Reference No. - N° de référence du client EN578-18-1138	Amendment No. - N° modif. 005
File No. - N° de dossier cy016.EN578-181138	CCC No./N° CCC - FMS No./N° VME
GETS Reference No. - N° de référence de SEAG PW-\$\$CY-016-77563	
Date of Original Request for Standing Offer Date de la demande de l'offre à commandes originale	
2019-08-08	
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-10-10	
Address Enquiries to: - Adresser toutes questions à: Schou, Christian	Buyer Id - Id de l'acheteur cy016
Telephone No. - N° de téléphone (613) 995-2278 ()	FAX No. - N° de FAX () -
Delivery Required - Livraison exigée	
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: See herein	
Security - Sécurité This revision does not change the security requirements of the Offer. Cette révision ne change pas les besoins en matière de sécurité de la présente offre.	

Instructions: See Herein

Instructions: Voir aux présentes

Acknowledgement copy required	Yes - Oui	No - Non
Accusé de réception requis	<input type="checkbox"/>	<input type="checkbox"/>
The Offeror hereby acknowledges this revision to its Offer. Le proposant constate, par la présente, cette révision à son offre.		
Signature	Date	
Name and title of person authorized to sign on behalf of offeror. (type or print) Nom et titre de la personne autorisée à signer au nom du proposant. (taper ou écrire en caractères d'imprimerie)		
For the Minister - Pour le Ministre		

This reason for this amendment is to advise all potential offerors of the questions and answers pertaining to this Request for Standing Offer in Part 001, and to revise the Request for Standing Offer in Part 002.

Please note that the slides for the bidder's conference and PSAB presentation were added to the attachment section of the buyandsell page.

Standard procurement templates (for reference only) requested at Question 26 will also be added to the attachment section of the buyandsell page.

Version 2 of Appendix 1 was also added to the attachment section of the buyandsell page. This version supersedes the previous version.

PART 001 – QUESTIONS AND ANSWERS

****Please note that some of the answers below that were provided during the Bidder's conference have been further clarified****

Questions 17-33 were submitted ahead of time to be answered during the bidder's conference.

- Q17 Will the resulting Standing Offer and/or Supply Arrangement allow departments to request a specific vendor with a SO/SA, based on their knowledge of that vendor's capabilities? We ask because specific vendors may have unique skills or competencies (e.g. language, cultural context, subject matter knowledge, process specialization) that a client department would want to access, and this would not be possible if the process for matching departments with vendors is randomized, as described in the RFSO.
- A17 Departments will need to follow the allocation process outlined in Part 7, Article 7.8.3.1 Selection Methodology for the "Main Offerors" - of the Request for Standing Offer revised in solicitation amendment 002. The Project Authority receives the generated list of offeror options for their combination of subcategories and they can then select the most suitable offeror among the choices for their specific project. If the Project Authority has a very specific skill or competency that is essential to their project, they can opt for a mini-competition under the Supply Arrangement. More information included in question 18.
- Q18 Could you please elaborate on the difference and the relationship between a supply arrangement and a standing offer?
- A18 Nothing unique needs to be submitted for the supply arrangement. If an Offeror is successful in obtaining a Standing Offer, they will automatically be issued a Supply Arrangement for the same subcategories of services (if they opted-in to "automatic" qualification in their submitted APPENDIX "2" OFFEROR'S CHOICE – SUB-CATEGORIES OF SERVICE SELECTION). Under the Supply Arrangement there will also be periodic opportunities for ongoing qualification should any other suppliers wish to obtain a Supply Arrangement, or current Supply Arrangement holders who wish to add any new subcategories.

We anticipate that most client requirements would go through the Standing Offer process, but in the event a requirement is estimated over \$700,000.00 (including applicable taxes), or the Project Authority has a specific technical requirement they aren't assured of getting under the Standing Offer, we would perform a mini-competition. Only Supply Arrangement holders qualified under the requested subcategories of services would be invited to bid. Criteria that is more specific or tailored to the individual project would be included in the mini-competition Request for Proposal

(RFP). Under the Supply Arrangement process, interested firms would provide a bid with costing, which would not need to match Standing Offer rates, and responses to demonstrate compliance with additional evaluation criteria, if any.

- Q19 Can the government still put out a Request for Proposals instead of always going through the Standing Offer?
- A19 This is not a mandatory Standing Offer or Supply Arrangement. If these tools do not meet their needs, Departments can use their delegated authority and put forth their own Request for Proposal for Public Engagement and Consultation services.
- Q20 The proposed format of the project summaries puts emphasis on demonstrating the offeror has direct experience in public consultation. Would you also accept projects that are more research oriented (e.g. projects where the offeror has worked with government to better understand processes around public consultation)?
- A20 The offeror should have direct experience in public consultation for Category 2. The services required are solely for the delivery of public engagement/consultation rather than the study of the practice.
- For Category 1, it is not necessary for the offeror to have directly completed the implementation and facilitation. However, the research should have led to and included strategic advice on the manner in which specific public engagement/consultation should be organized (Category 1, subcategory A). Concrete examples of direct content development are required for Category 1, subcategory B.
- Q21 ePost - can you please elaborate on the ePost submission details?
- A21 Details on ePost connect can be found in Part 2, Article 2.2 Submission of Offers, as well as Part 3 – Offer Preparation Instructions. Further information is also included at the following link: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2006/23#transmission-by-facsimile>
- Q22 Sample Template - Appendix 1 - Is it intended that we provide three (3) previous project examples within this template? Meaning that we should reproduce the templated information 3 times in the submission?
- A22 Please use this format for each project submitted. If you will be submitting the same project for multiple subcategories, all information can be included in one summary sheet. Amendment 003 added a word document of our sample template under the attachment section of the buyansell page. The word document itself, however, does not need to be used to create the offer. We simply need the structure (heading/subheading) to be used. This will make it easier for evaluators to find where and how you meet each criteria. For Electronic attachments on the buyandsell page, please ensure you have the latest version.
- Q23 Annex G - Could we please review the individual tables? What Section do these Annexes belong to?
- A23 This Annex should be completed, as applicable, and provided along with your Certifications.
- Q24 Annex F – Electronic Payment Instruments- Where does this information belong? In the Financial Offer section?

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- A24 Please include this in the Financial Offer.
- Q25 Offeror Profile - Is there a template for the Offeror Profile or a link?
- A25 The Offeror profile is still under development. An Offeror profile template will be sent to successful firms who have obtained a Standing Offer. MA.4 Offeror Profile simply states that the offeror agrees to complete an Offeror Profile, either prior to or in the early stages after the Standing Offer Issuance.
- Q26 Standard Procurement Template - Can you please provide a copy of the standard procurement template(s), as applicable?
- A26 Copies of the most recent Standard Procurement Templates: Medium Complexity (MC) for medium complexity requirements; and High Complexity (HC) for more complex requirements, will be added to the attachment section of the solicitation page on buyandsell. These templates could be used for mini-competitions under the Supply Arrangement.
- Q27 Are offerors required to provide project team details / bios?
- A27 No project team details/bios are required. Only the information requested in each criterion is required. The company or joint venture as a whole is being assessed. Understanding that resources could change over time, please note that any proposed individual resources under a subcategory of service must meet the requirements of the RFSO and be able to provide the services as outlined in the Standing Offer's Statement of Work for that subcategory as well as any additional details outlined in the individual project's Statement of Work.
- Q28 Are offerors required to provide all proposed services in French and English or can they bid for service areas under one language?
- A28 The GC is required under the Official Languages Act to provide its services in both official languages of Canada. Given this requirement, the Contractor must have the capacity to conduct the work in both English and French. This requirement is waived for Indigenous-led Contractors conducting Indigenous engagement.
- Q29 R2A.2 Optional services: Engaging with Indigenous people- In some categories the RFSO asks for examples of projects in EN/FR and 1 Indigenous language. Is a multi-stakeholder process that included engagement of indigenous people /communities acceptable for demonstration under R2A.2 Optional services: Engaging with Indigenous People? Do all services have to be provided in an indigenous language? For example would a project where written material was provided in an indigenous language, but interpretation services on-site only in French and English, be acceptable?
- A29 It must be clear how indigenous people/communities were distinctly engaged. It must be clear how the engagement process was appropriate and responded to the reality and needs of indigenous people, including being culturally appropriate. A general process to which indigenous people would have participated would not qualify.

Services must have been acceptable in the context they were offered. If the community preferred the engagement to be held in French and English with written material in their language, it would be acceptable. If services on-site were not offered in the indigenous language for practicality, it would not be acceptable.

Q30 Different EN/FR capacity requirements for in-person and on-line facilitation- In-person facilitation services seems to demand bilingual projects (pg. 69) but on-line facilitation doesn't (pg. 72). What is the rationale for this?

A30 The Criteria for R2B.1 Digital Platform/Tool and Facilitation will be revised in Part 002 of this solicitation amendment.

Q31 In person facilitation- The only question I have for in-person facilitation comes from a statement of page 94, where it says includes engagement of the general public (citizens and residents). Does this includes people participating as patients?

A31 Patients are part of the general public, they are included.

Q32 R2B (digital/online engagement - see pages 46-47 and pages 71-72) - Are projects that used webinars, (as a live, web-based video conference), are considered acceptable for this category. They do give a definition of a digital platform/tool on pg. 39 but it is still unclear. They do not seem to be asking for provision of the platform, since they state use of in-house or sub-contracting platform.

A32 One of the key benefits of online engagement is to allow participants to choose when to participate. There are limited circumstances in which a webinar would be the most adequate option for online public engagement with a large amount of people. Offerors should be able to demonstrate how they can fulfill a variety of online engagement needs: "Demonstrate experience in the use of a variety of techniques to generate online dialogue" (bullet number 8, p. 72).

A separate list under subcategory of service 2B will be created for offerors that can also deliver on requirement estimated at over 100 participants. Please see Part 002 of the solicitation amendment for the revision to Criteria R2B.1.1 Firm's Experience.

Q33 Fees (p. 52) - it is stated that professional fees are all inclusive. I am not sure what that means as they do go on to provide for direct expenses (e.g. travel). Does this just mean overhead? Do fees need to include taxes and any travel expenses?

A33 The firm hourly rates are all inclusive. They include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting any applicable taxes. All expenses normally incurred in providing the services (i.e. project office space [including Contractor's hardware and software], word processing, reports, work estimates, photocopying, courier and telephone charges, local travel and the like) are included in the firm hourly rate identified hereunder, and will not be permitted as direct charges under any Call-up against a Standing Offer.

Any local travel would be included in the all-inclusive firm hourly rates. Any travel beyond local travel will be covered under B.1.3 Travel and Living Expenses as defined by the National Joint Council Travel Directive. Any travel covered by B.1.3 Travel and Living Expenses requires prior authorization by the Project Authority.

Questions received during the Bidder's conference – August 28, 2019

Question 34 to 41 were received via the WebEx chat.

- Q34 To clarify, do you plan on issuing the standing offer in December 2019 or winter 2020.
- A34 We expect to issue the standing offers in winter 2019-2020.
- Q35 I don't understand how to find the forms to fill out on BuyandSell. There are so many forms that it's hard to understand.
- A35 All the information that is needed to build your offer can be found in the Request for Standing Offer documentation and its amendments on the buyandsell page. Towards the bottom of the buyandsell page we made some of the Annexes and Appendices available as downloadable documents under the "Attachments" section should an Offeror wish to build part of their Offer using these electronic versions. Please note that electronic documents are not provided for every element that must be submitted in your Offer. Offerors will need to read and follow closely the instructions set out in the Request for Standing Offer to build their Offer. Offerors must also monitor the buyandsell page to be aware of any future amendments that may revise any of the information that needs to be provided.
- Q36 Can I send my offer directly to Christian, the Standing Offer Authority?
- A36 No, you cannot send the offers directly to the Standing Offer Authority. If you want to send the offers electronically, you have to use the ePost connect services and send it according to the instructions outlined in the Request for Standing Offer. Please see answer provided at Question 21. Physical copies of the Offer also cannot be sent directly to the Standing Offer Authority. Ensure you follow the Offer Submission Instructions in the RFSO.
- Q37 Can I submit an eligible bid entirely as a word document or a PDF document without using files provided in the RFSO?
- A37 We will use your submitted documents to properly evaluate your Offer. You do not need to build your offer with the electronic templates that are provided, as long as you are still providing the information that is required in the Request for Standing Offer. If you want to use a specific kind of formatting, word or pdf, that's not an issue, as long as the proper headings/subheadings are there, that the structure is followed, that we have all the certifications and annexes, and that your offer is submitted as separate documents as detailed on Slide 16 of the bidder's conference presentation. The financial information must be in a separate document from the technical offer, as these items will be evaluated separately.

Please ensure you keep checking the buyandsell page until the end of the solicitation period in the event there are any changes to the RFSO, Annexes, Appendices, and electronic attachments. We cannot remove any documents or attachments that are already up on buyandsell, we can simply add an amendment to change or correct it, or in the case of attachments, provide a new downloaded version.

The Answer provided at Question 52 includes an answer that further describes the Sample template.

- Q38 Is the only electronic way to submit our offer epost connect? If we have to send it 5 days in advance, it drastically reduces the number of days we have to bid.

A38 ePost connect is the only method we can accept electronic bids/offers at this time. Offers sent by mail or email directly to the Standing Offer Authority will not be evaluated and found non-compliant. The recommendation for ePost connect is for the supplier to register and open an epost Connect conversation to ensure it is in working order. This can be done at any time. We simply want to avoid Offerors having issues with ePost Connect and missing the deadline. An Offer received after bid closing date and time will not be evaluated. Sending a physical copy of the Offer to the Bid Receiving Unit is also an option.

If the Offeror is simultaneously providing copies of its offer using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

Q39 What does GBA stand for (evaluation criteria)?

A39 It stands for gender-based analysis. More details are available in the Statement of Work of the RFSO.

Q40 Do all proposed resources in the submission have to be able to provide facilitation services in French and English?

A40 The Offeror as a whole must be able to provide services in both French and English for the subcategories there are offering. An Individual facilitator that is used by the Offeror does not need to be able to provide services in both French and English. For example, on a project, the Offeror can have resource(s) that provide facilitation services in French, and other resource(s) that provides facilitation services in English. Services must be available in both official languages everywhere, but not necessarily by the same person.

Q41 Will project experience with non-federal clients be scored lower than projects with federal clients?

A41 No. All projects will be scored against the Criteria, using the Evaluation Grids found in Annex D of the RFSO. Each Criterion outlines the required elements we need to see in order to determine the technical score with the Evaluation Grid.

Questions 42-48 were received through teleconference.

Q42 Let's say, as a company, you've done a certain project, but your resource has done different projects but with another company. Do all those count? Can you combine them all together? Or do they all have to be with the same company?

A42 If you are submitting as a joint venture, then shared experience from all companies that are members of the joint venture would be accepted.

Individual resource project experience completed for other companies or companies that are not members of the joint venture would not be accepted. The corporate capacity and experience of the offeror (company or joint venture) is being evaluated rather than any individual resource experience. To qualify, offerors must demonstrate that they can provide the required services and any necessary resources throughout the duration of the Standing Offer, regardless of any change in individual resources.

Q43 What is the maximum number of project samples that you can submit per subcategory?

A43 To facilitate the evaluation, we ask that Offerors only provide the number of projects requested per subcategory. So, if we ask for 3, we only want 3. Choose your 3 best.

Clarification will be added to Annex D in Part 002 of this solicitation amendment in the event an Offeror provides more than 3 projects per Criterion.

Q44 Is there a geographic component to the assessment? Or consideration when you're short-listing the best-value offer? E.g.: best-value per region. This is for my Vancouver office.

A44 We are qualifying suppliers on a Standing Offer list for work that involves, for the most part, national consultations. Although the Offeror profile is currently in development, we will likely include a list of the regions of delivery an Offeror is able to provide services in. When a Client has a requirement, they would then select the applicable regions for the project along with the other elements already detailed in the Allocation Process. Only Offerors able to provide services in all the Client Department's requested regions at the onset would be considered in the allocation process.

Offerors that are able to qualify under the Standing Offer, but are only able to provide services in certain regions, we will try to include a list of regions to the Offeror Profile. This way these firms will only be considered for projects that cover their regions they are able to deliver to. A minor addition will be included to the Allocation process to include this element. The Change will be noted in Part 002 of this solicitation amendment.

Q45 Can you explain the choice of the 500 participant number for online consultation?

A45 Organizing an online dialogue for 500 people should involve a level of structuring the discussions that could work for larger numbers of participants. It also ensures the tool can sustain more than minimal volume.

Please note the revised answers at Question 32, and Question 46 for more details, and see Part 002 of this solicitation amendment for the revision to Criteria R2B.1.1 Firm's Experience.

Q46 You said that you are interested, primarily, in firms that can offer on a national basis. You just mentioned the 500 people. I think that on the AI side or the analysis side, there was a requirement for 10,000. Given that the profile of the industry is 90% of people are involved in small firms that are regionally or locally-based, are you considering the industrial policy impact of your RFSO in precluding those? Are you contemplating running another competition for the other 90% of the industry?

A46 Engaging with Canadians as the Government of Canada usually involves outreach across the country, often to large amounts of people. In this solicitation amendment under Part 002, we have added a separation between small scale online engagements project (usually stakeholders only, and less than 100 participants) and large scale online engagements to consider different capacities and skills. All this comes from our awareness that different excellent firms have niche expertise that can be offered across the country. We are confident many of the sub-categories of services can be offered from anywhere. Please note the revised answers at Question 32, and Question 45 for more details, and see Part 002 of this solicitation amendment for the revision to Criteria R2B.1.1 Firm's Experience.

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- Q47 Have you considered with the requirements for scale, large numbers, plus the additional requirement that you've announced (2 of the 3 projects have additional requirements), that you have created a situation where there's an unfair advantage to the suppliers who were on the previous Standing Offer? Because, everyone else was excluded from the projects of scale on that; the RFSO may not be meeting a basic minimum threshold of fairness.
- A47 We are looking for services to reach out to Canadians across the country. If we are to engage successfully with Canadians and give them a say on decisions that affect them, we need capacity to engage large amounts of people across the country. Most consultations that our clients conduct involve many participants. While we want to be able to provide opportunities to smaller firms under this tool, we need to ensure that we have firms that are able to deliver on the majority of the requirement that will flow through this tool. That being said we have separated subcategory 2B. Please note the revised answers at Question 32, Question 45, and Question 46 for more details, and see Part 002 of this solicitation amendment for the revision to Criteria R2B.1.1 Firm's Experience.
- Q48 Is there any page limit when we submit?
- A48 While there is no page limit, we ask potential Offerors to follow the structure, submit only what is requested, and limit to the number of projects that are asked per criteria. For Project examples, please follow the layout in Appendix 1, which is further explained at Question 57.

Questions 49-64 were submitted following the teleconference.

- Q49 Thank you for leading the webex. I must admit that I have come to the conclusion that this RSFO is beyond the scope of a specialized Public Engagement consulting firm. It seems to be out of touch with the reality of 90% of the firms that in fact do the public engagement needed across the country (small and medium firms that do high value consultations and engagement, using dialogue methods other than standard surveys and questionnaires. A focus on methods for 500 + people reduces engagement to simple surveys and questionnaires, and excludes experience outside of the Federal Government (municipal consultations, etc). All kinds of smaller group dynamics critical to the field seem to be lost in the technical requirements. Is this what the PCO client wants? Last year I gave Public Engagement training to PCO staff and other Government of Canada employees, and never had the impression that they were only focused on big, survey-based consultations only. Hard to call that two-way dialogue. Have I missed something about their intent?

On a different matter, to be frank I am overwhelmed by a 100 page document with multiple annexes and templates, some of which are provided as attachments and others of which are not (certification forms, many of the annexes, etc.). The level of investment needed to study all of these materials is significant. I have also found it hard to determine what the essential components of the bid are, and am fearful that I will miss something that makes my bid unacceptable. Add to that the epost requirement and a deadline that is 5 working days before the deadline. All rather disheartening.

- A49 Please see the revised answers at Question 32, Question 45, and Question 46 for more details on Criteria R2B.1.1 Firm's Experience, and see Part 002 of this solicitation amendment for the revision to the Criteria.

We understand that there is substantial information that must be provided under this Request for Standing Offer. Part 3 of the Request for Standing Offer was revised in Part 002 of this solicitation amendment to further clarify what is required. In Solicitation amendment 002 we have also included a phased offer compliance process to the Request for Standing Offer. This process may

give the possibility of correcting, after bid closing, certain types of errors and omissions in the submitted offer.

Q50 Given the explosion of public engagement at all jurisdictional levels over the last decade which has provided ample opportunity for online public engagement companies to demonstrate their capacity and capability in this area utilizing numerous contracting vehicles available, would Canada not ensure that online public engagement providers meet a higher threshold of capacity/capability than 500 participants in 2 of 3 projects? We feel that 1,000 participants in each of the 3 projects put forward is reasonable. Also, we assume that many of the federal government's online public engagements would be national in scope with the unique elements associated with that. Why is Canada not taking that into consideration by requesting that 1 or more online projects put forward are national in scope? Will Canada consider amending the RFSO to align to one or both of these suggestions?

A50 We consider that organizing a successful online dialogue for 500 participants requires similar skills and capacities than for 1000 participants. For online consultations, it doesn't make a difference where the individual participates. Ensuring that the facilitation gets offered in both official languages and that the tool can manage at least 500 participants seems more fair than requesting that the projects were national in scope.

Many consultations at the municipal or provincial level can reach 500 people. This number avoids being unnecessarily restrictive and eliminating firms that have the capacity for larger national consultations but haven't yet had the opportunity.

Q51 We want to confirm that any project submitted as part of a response to this RFSO can only be submitted by the company that was under contract to deliver that project.

A51 Yes. Please see the answer that was provided and clarified for Question 42.

Q52 For project examples, can we highlight project experience from subcontractors (if the work was conducted on behalf of another institution)?

A52 No the project needs to have been conducted on behalf of the Offeror or in the case of a joint-venture, one of the joint-venture members.

Q53 Is there any penalty for turning down call-ups?

A53 There is no penalty for turning down a call-up. Should an Offeror end up turning down every project they are offered on multiple occasions, the Standing Offer Authority may reach out the Offeror to find out if there are any specific reasons why no projects have been accepted. New information could be used to update the Offeror Profile and Allocation Process to ensure projects aren't needlessly offered to a firm that does not want to be considered for, and has no intention of accepting, a certain type of project.

Q54 Are we allowed to submit the Offer both electronically and in hard copy so as to mitigate any delivery risks?

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- A54 An Offeror is allowed to submit their offer in more than one of the acceptable delivery methods. However, please see the answer that was provided and clarified for Question 38 should there be any discrepancy in the different copies.
- Q55 Are we allowed to submit an Offer, and then afterwards submit an amendment before the closing date?
- A55 Yes. Please note that it is a new version that supersedes the old one as we may receive both.
- Q56 Are we allowed to attach appendices as needed for each sub category?
- A56 There is no restriction in this regard, but we ask Offerors to please only provide the information requested in the RFSO and to follow the structure outlined for Offers of the RFSO. Information provided in the Offer that does not respond to any of the criteria detailed in Annex D, will not be considered in the offer's evaluation. Please see the answer that was provided and clarified for Question 48 for more details.
- Q57 With regards to the Sample Template in Appendix "1", could you please clarify how this template is expected to be used? Specifically, there are headings such as Expert and Strategic Advice, Content Development, Project Management, Logistics Planning, etc. (first column) : When responding to each Sub-Category, are we required to provide information for all of these headings? We ask because we see that some of the headings may not be relevant to all Sub-Categories. For example, the *Category 2: Implementation and Facilitation, A. In-Person*, the heading "Digital Platform/tool and facilitation" may not be as relevant.
- A57 Given all the different permutations, we could not include a sample template for each possible project option. As a result, the template includes all subcategories and optional services. An Offeror should use one sample template per project. If an Offeror is submitting a project, only the background information heading, and the applicable sub-category headings need to be included. Sub-categories that aren't applicable to the specific project can be removed or left blank.

For example, if an Offeror is submitting one of their projects ONLY for Subcategory A – In-Person, the sample template would include the following headings:

- 1) Background Information
- 2) Project Management*
- 3) Logistics Planning
- 4) Two-way dialogue engagement design and implementation

**Given that project management is needed for both the In-Person and Online Categories, if an Offeror is submitting for both In-person and Online, only 3 of the projects will need to include the heading for Project Management.*

Each of the headings in the first column, listed above, would include all of the subheadings found in the second column.

For example, Logistics Planning would include the following sub-headings:

- Described the invitation and participant recruitment process;
- Described the challenges and solutions encountered during the logistics planning;

- Described challenges and solutions, such as communicating privacy rights and obtaining consent to use personal information, and what specific policies and procedures were followed; and

- Described lessons learned

Under each subheading, the Offeror would provide a response to that subheading. Logistics Planning also has two optional services. If an Offeror will be submitting an Offer that includes these optional services, these subheadings will need to be included for at least one of the submitted projects.

- Q58 With regards to Category 1, Sub-Category A: Expert and Strategic Advice, are we allowed to highlight providing advice about organizational policies and procedures related to engagement work? Or does it only have to relate to specific public facing projects?
- A58 It should be demonstrated how the advice applied in concrete projects. Make it clear what the results of the advice was and how it demonstrates the advice was appropriate.
- Q59 As part of Category 1, Sub-Category A: Expert and Strategic Advice, could you please provide more details regarding "Evaluation Planning Advice"?
- A59 Evaluation should be considered from the inception of the engagement process. Offerors should explain how they will provide advice that allows to evaluate the results of the process.
- Q60 Based on the Sample Template in Appendix 1, a full submission is made up of only project examples, is that the correct interpretation? In other words, can applicants provide general information about their skills and competencies separate from the project examples?
- A60 All the Point Rated Criteria, with the exception of R4 Quality Assurance, are primarily focused on project examples by the Offeror/Firm. Any information that is provided in the Offer that does not answer or demonstrate any requirements of a criteria cannot be taken into consideration in the final score of the technical evaluation.
- Q61 Is it a requirement that *all* project examples must be delivered in both official languages? We ask this because we have a few excellent project examples that are more local/regional in scale but conducted in just one language.
- A61 Criteria R2A.2.1 Firm's Experience for Two-Way Dialogue Engagement Design and Implementation, R2B.1.1 Firm's Experience for Digital Platform/Tool and Facilitation, and Criteria R3.1 – Firm's Experience for Analysis, Reporting and Evaluation have been revised for the language component. Please see Part 002 of this solicitation amendment for the revised criteria.
- Q62 For Category 1, Sub-Category B: Content development, do examples of content/material include activity-generated material such as an "Ideas Wall" or card games?
- A62 The content evaluated is the material that was produced by the Offeror. In the example provided, it would be the instructions given to participants so that they generate ideas.
- Q63 In heading B.1.1 Subcontracted Services, if we have a specific subcontractor, does it count within the \$25,000 subcontractor service limit?

A63 B.1.1 Subcontracted Services will be applicable for any subcontracted work that would not be estimated and billed according the hourly rates submitting in Annex "E". Since the firm's hourly rates are the only financial elements that can be evaluated, B.1.1 Subcontracted Services is included to ensure Canada is receiving best value for any work that is requested through a Call-up.

Q64 Is being able to demonstrate the ability to conduct activities in both French and English an essential criteria for each project submitted under a subcategory?

Or will the evaluators find it sufficient to submit one French language project of the three submitted as demonstrated ability to deliver projects in French?

A64 Please see answer provided to Question 61.

THE FOLLOWING CHANGES FORM PART OF THE RFSO

1) At Part 1, General Information, 1.7 Standing Offers-

DELETE:

Category 1: Planning and Development

Sub-Category- A. [Expert and strategic advice](#)

Sub-Category- B. [Content development](#)

Category 2: Implementation and Facilitation

For both in person and online

Sub-Category- A. [In person](#)

Sub-Category- B. [Online](#)

Category 3: Analysis, Reporting and Evaluation

Sub-Category- A. [Without automated complex text analysis](#)

Sub-Category- B. [With automated complex text analysis](#)

AND REPLACE WITH THE FOLLOWING:

Category 1: Planning and Development

Sub-Category- A. [Expert and strategic advice](#)

Sub-Category- B. [Content development](#)

Category 2: Implementation and Facilitation

For both in person and online

Sub-Category- A. [In person](#)

Sub-Category- B. [Online](#)

i. Up to 100 participants

ii. Over 100 participants

Category 3: Analysis, Reporting and Evaluation

Sub-Category- A. [Without automated complex text analysis](#)

Sub-Category- B. [With automated complex text analysis](#)

2) At Part 3, Offeror Preparation Instructions-

DELETE IN ITS ENTIRETY AND REPLACE WITH THE FOLLOWING:

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

- If the Offeror chooses to submit its offer electronically, Canada requests that the Offeror submits its offer in accordance with section 08 of the 2006 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation. The offer must be gathered per section and separated as follows:

Section I: Technical Offer
Section II: Financial Offer
Section III: Certifications and Additional Information

- If the Offeror chooses to submit its offer in hard copies, Canada requests that the Offeror provides its offer in separately bound sections as follows:

Section I: Technical Offer (4 hard copies) (and 1 soft copy on USB key)

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

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

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

- If the Offeror is simultaneously providing copies of its offer using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

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

Canada requests that offerors follow the format instructions described below in the preparation of hard copy of their offer:

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

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, Offerors 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.

3.1.1 Section I: Technical Offer

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

Offerors must clearly identify which Sub-Category they are submitting an offer for, as outlined in Annex "A" - Statement of Work. Each Sub-Category will be evaluated separately.

3.1.2 Section II: Financial Offer

Offerors must submit their financial proposal form in accordance with the Annex "B", Basis of Payment.

3.1.2.1 Electronic Payment of Invoices - Offer

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "F" Electronic Payment Instruments, to identify which ones are accepted.

If Annex "F" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

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

3.1.3 Section III: Certifications and Additional Information

Offerors must submit Article 2.3 Former Public Servant, the certifications and additional information required under Part 5, and the following:

3.1.3.1 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures

- 3.1.3.1.1** As indicated in Part 6 under Security Requirements, the Offeror must provide the full addresses of the Offeror's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

- 3.1.3.1.2** The Company Security Officer must ensure through the [Contract Security Program](#) that the Offeror and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

3.1.3.2 Offeror Form/Subcontractor Form

Fill out the form at Annex "G" – Offeror Form/Subcontractor Form

3.1.4 Summary of content for each section

Summary of content for Section I: Technical Offer

- 1) The Offeror's responses to the applicable criteria in Annex "D" – Technical and Financial Evaluation Criteria, while using Appendix "1" Sample Template "Proposed Project Summary Sheet" as a template for the project examples that are in response to the criteria.
- 2) Appendix "2" Offeror's Choice – Sub-Categories of Service Selection

Summary of content for Section II: Financial Offer

- 1) Annex "E" – Financial Proposal Form
- 2) Annex "F" – Electronic Payment Instruments

Summary of content for Section III: Certification and Additional Information

- 1) Part 2, Article 2.3 Former Public Servant
- 2) All applicable Certifications from Part 5 – Certifications and Additional Information
- 3) Articles 3.1.3.1 Offeror's Proposed Sites or Premises Requiring Safeguarding Measures
- 4) Annex "G" – Offeror Form /Subcontractor Information

3) At Part 7, Article 7.8.3.1 Selection Methodology for the "Main Offerors "-

DELETE:

STEP 1
Identify Qualified Offerors
The Project Authority selects required categories of services and level of security, and the Contracting Authority uses the request to generate the list of qualified Offerors. The list will include any PSAB Offerors qualified under the requested Categories.

AND REPLACE WITH THE FOLLOWING:

STEP 1
Identify Qualified Offerors
The Project Authority selects required categories of services, optional services, region(s) of delivery, and level of security, and the Contracting Authority uses the request to generate the list of qualified Offerors. The list will include any PSAB Offerors qualified under the requested Categories.

4) At Annex "A" Statement of Work, A1.2 Definitions and descriptions-

ADD:

Indigenous language: A language spoken by Indigenous peoples.

5) At Annex "D" Technical and Financial Evaluation, Article 1.1 Mandatory Technical Criteria, MA.1 Firm's Experience-

ADD:

If more than three (3) projects are submitted for a criteria, only the first three (3) projects in order of appearance will be read and considered in the evaluation. Any extra projects that are included for the criteria will not be considered as part of the evaluation process.

6) At Annex "D" Technical and Financial Evaluation, Article 1.1 Mandatory Technical Criteria, MA.1 Firm's Experience-

DELETE:

The following are the service categories:

Category 1: Planning and Development

- Sub-Category- A. Expert and Strategic Advice
- Sub-Category- B. Content Development

Category 2: Implementation and Facilitation

- For both in person and online
- Sub-Category- A. In person
- Sub-Category- B. Online

Category 3: Analysis, Reporting and Evaluation

- Sub-Category- A. Without Automated Complex Text Analysis
- Sub-Category- B. With Automated Complex Text Analysis

AND REPLACE WITH THE FOLLOWING:

The following are the service categories:

Category 1: Planning and Development

- Sub-Category- A. Expert and Strategic Advice
- Sub-Category- B. Content Development

Category 2: Implementation and Facilitation

- For both in person and online
- Sub-Category- A. In person
- Sub-Category- B. Online
 - i. Up to 100 participants
 - ii. Over 100 participants

Category 3: Analysis, Reporting and Evaluation

- Sub-Category- A. Without Automated Complex Text Analysis
- Sub-Category- B. With Automated Complex Text Analysis

7) At Annex "D" Technical and Financial Evaluation, Article 1.2 Point-Rated Technical Criteria, R2A.2 Two-Way Dialogue Engagement Design and Implementation for Subcategory A – In-Person

DELETE:

R2A.2.1 Firm's Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Facilitation services provided in both French and English;
- Demonstrated experience in the use of a variety of methods and techniques to generate dialogue for a variety of objectives;
- Description of challenges and solutions encountered while providing facilitation services, such as dealing with emerging issues and unexpected or unforeseen events; and
- Description of any lessons learned.

One (1) of the three (3) public engagement projects must:

- Include an engagement method other than a town hall meeting or the presentation of a set of options to a selected group for feedback.

One (1) of the three (3) public engagement projects must:

- Include the general public (citizens and residents).

AND REPLACE WITH THE FOLLOWING:

R2A.2.1 Firm's Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Facilitation services provided in both French and English*;
- Demonstrated experience in the use of a variety of methods and techniques to generate dialogue for a variety of objectives;
- Description of challenges and solutions encountered while providing facilitation services, such as dealing with emerging issues and unexpected or unforeseen events; and
- Description of any lessons learned.

One (1) of the three (3) public engagement projects must:

- Include an engagement method other than a town hall meeting or the presentation of a set of options to a selected group for feedback.

One (1) of the three (3) public engagement projects must:

- Include the general public (citizens and residents).

*Offerors need to demonstrate they have successfully offered services in both official languages. Of the three project examples provided, there should be at least one in each official language or one that is bilingual. All three (3) projects do not need to be bilingual. For example, three bilingual projects will not be graded better than two projects in one language and a third that is bilingual. Each Project must clearly state the language(s) the facilitation services were offered in.

8) At Annex “D” Technical and Financial Evaluation, Article 1.2 Point-Rated Technical Criteria, R2B.1 Digital Platform/Tool and Facilitation

DELETE:

R2B.1.1 Firm’s Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Demonstrate the delivery through in-house development or subcontracting of the online platform;
- Explain the process for testing the online platform;
- Explain the processes and capabilities to support troubleshooting and technical support;
- Explain how the information was kept reliable and secure (information security);
- Demonstrate the facilitator’s role during the consultations;
- Demonstrate how the rules of engagement were applied;
- Demonstrate that the facilitation services was done in French and/or in English and/or in Indigenous languages;
- Demonstrate experience in the use of a variety of techniques to generate online dialogue;
- Describe challenges and solutions encountered while providing the online facilitation services, such as dealing with emerging issues and unexpected or unforeseen events;
- Demonstrate how data produced were in a format that allowed analysis and could be made available as open data; and
- Describe any lessons learned.

AND REPLACE WITH THE FOLLOWING:

R2B.1.1 Firm’s Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Demonstrate the delivery through in-house development or subcontracting of the online platform;
- Explain the process for testing the online platform;
- Explain the processes and capabilities to support troubleshooting and technical support;
- Explain how the information was kept reliable and secure (information security);
- Demonstrate the facilitator’s role during the consultations;
- Demonstrate how the rules of engagement were applied;
- Demonstrate that the facilitation services were done in English and French; or English and Indigenous language(s); or French and Indigenous language(s); or French, English and Indigenous language(s)*;
- Demonstrate experience in the use of a variety of techniques to generate online dialogue;
- Describe challenges and solutions encountered while providing the online facilitation services, such as dealing with emerging issues and unexpected or unforeseen events;
- Demonstrate how data produced were in a format that allowed analysis and could be made available as open data; and
- Describe any lessons learned.

*Offerors need to demonstrate they have successfully offered services in at least two (2) languages (English, French, Indigenous). Of the three (3) project examples provided, there should be at least one (1) project in the other official language (if the first two (2) projects were in English, than the 3rd must include

French); or one (1) that is bilingual (English and French); or one (1) that is bilingual (official language and an Indigenous language). All three (3) projects do not need to be multilingual. For example, three (3) multilingual projects will not be graded better than two (2) projects in one (1) language and a third that is multilingual. Each Project must clearly state the language(s) the facilitation services were offered in.

All Offerors meeting the criteria will be considered for small scale online engagements project under Sub-Category B. – Online, i. Up to 100 participants.

To qualify for Subcategory B – Online, ii. Over 100 participants two (2) of the three (3) projects submitted must:

- Include a digital platform or tool that allows participants to engage at any time.
- Include at least 500 participants

It must be clearly stated which project falls into subcategory B, ii. Over 100 participants.

9) At Annex “D” Technical and Financial Evaluation, Article 1.2 Point-Rated Technical Criteria, R3 Analysis, Reporting and Evaluation A. Without Automated Complex Text Analysis B. With Automated Complex Text Analysis*

DELETE:

R3.1 – Firm’s Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Demonstrated experience in:
 - planning and outlining data collection frameworks;
 - planning and outlining the analysis plan
- Demonstrated experience in carrying out quantitative and qualitative analysis using efficient and reliable methods;
- Describe challenges and solutions encountered in the production of reports, and types of reports;
- Demonstrate how the assessment was carried out or could have been carried out, including criteria and how the results were presented;
- Number of participants involved and amount of data analyzed; and
- Describe any lessons learned.

***To qualify for Subcategory B – With Automated Complex Text Analysis**, two (2) of the three (3) projects submitted should fall into Subcategory B, including one (1) project with over 10,000 participants. It must be clearly stated which project falls into this subcategory. The Offeror must explain how quality analysis was done for text in both official languages. A complex text is at least 50 words.

AND REPLACE WITH THE FOLLOWING:

R3.1 – Firm’s Experience (project example) (30 points per project submitted) (Minimum pass mark for this criterion is 63 points.)

For each of the three (3) project examples, the Offeror must provide detailed information on the following in its submission:

- Demonstrated experience in:
 - planning and outlining data collection frameworks;

- planning and outlining the analysis plan
- Demonstrated experience in carrying out quantitative and qualitative analysis using efficient and reliable methods;
- Demonstrated the ability to analyze text in both English and French**;
- Describe challenges and solutions encountered in the production of reports, and types of reports;
- Demonstrate how the assessment was carried out or could have been carried out, including criteria and how the results were presented;
- Number of participants involved and amount of data analyzed; and
- Describe any lessons learned.

***To qualify for Subcategory B – With Automated Complex Text Analysis**, two (2) of the three (3) projects submitted should fall into Subcategory B, including one (1) project with over 10,000 participants. It must be clearly stated which project falls into this subcategory. The Offeror must explain how quality analysis was done for text in both official languages. A complex text is at least 50 words.

**Offerors need to demonstrate they have successfully offered text analysis services in both official languages. Of the three project examples provided, there should be at least one in each official language or one that is bilingual. All three (3) projects do not need to be bilingual. For example, three bilingual projects will not be graded better than two projects in one language and a third that is bilingual. Each Project must clearly state the language(s) the facilitation services were offered in.

10) At Annex “D” Technical and Financial Evaluation, Article 1.3 Financial Evaluation for all Subcategories, Step 3-

DELETE:

Offeror	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E	FIRM F	FIRM G	FIRM H
Combined rate for 2A: Logistics Planning	\$80.00	\$81.00	\$62.00	Non-compliant	Non-compliant	\$25.00	\$250.00	\$30.00
Combined hourly rates below average, more than 50% below (\$63.25/2) =	Responsive	Responsive	Responsive	Non-responsive	Non-responsive	Non-responsive	Non-responsive	Non-responsive
\$31.62								
Combined hourly rates below average, more than 50% above (\$63.25*2) =								
\$126.50								

AND REPLACE WITH THE FOLLOWING:

Offeror	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E	FIRM F	FIRM G	FIRM H
Combined rate for 2A: Logistics Planning	\$80.00	\$81.00	\$62.00	Non-compliant	Non-compliant	\$25.00	\$250.00	\$30.00
Combined hourly rates below average, more than 50% below (\$63.25/2) =	Responsive	Responsive	Responsive	Non-responsive	Non-responsive	Non-responsive	Non-responsive	Non-responsive
\$31.62								
Combined hourly rates below average, more than 100% above (\$63.25*2) =								
\$126.50								

11) At Appendix "1" SAMPLE TEMPLATE- PROPOSED PROJECT SUMMARY SHEET-

DELETE:

<p>Two-way dialogue engagement design and implementation:</p>	<ul style="list-style-type: none"> • Executed facilitation services in both French and English; • Demonstrated experience in the use of a variety of methods and techniques used to generate dialogue for a variety of objectives; • Described the challenges and solutions encountered during the facilitation services: such as dealing with emerging issues and unexpected or unforeseen events; and • Describes any lessons learned. <p style="background-color: #e0ffff; display: inline-block; padding: 2px;">Check the boxes, as applicable to the project:</p> <p><input type="checkbox"/> Includes an engagement method other than a town hall or presenting a set of options to a selected group for feedback.</p> <p><input type="checkbox"/> Includes engagement of the general public (citizens and residents).</p>
	<p>For one (1) of the public engagement projects submitted under R2A.2.1:</p> <ul style="list-style-type: none"> • Include the incorporation of the principles of a Gender-based Analysis Plus (GBA+) OR how it could have been incorporated; and • The offeror must detail its impact on the two-way dialogue engagement design and implementation.
	<p>Optional Services - Engaging with Indigenous people (if offered)-</p> <p>One (1) of the public engagement projects submitted under R2A2.1 must have include engagement with Indigenous peoples.</p> <ul style="list-style-type: none"> • Details on how they ensured the design and implementation of the engagement project would be effective in reaching and engaging Indigenous peoples. For this project, services must have been provided in an indigenous language.

AND REPLACE WITH THE FOLLOWING:

Two-way dialogue engagement design and implementation:	<ul style="list-style-type: none">• Executed facilitation services in both French and English;• Demonstrated experience in the use of a variety of methods and techniques used to generate dialogue for a variety of objectives;• Described the challenges and solutions encountered during the facilitation services: such as dealing with emerging issues and unexpected or unforeseen events; and• Describes any lessons learned. <p>Check the boxes, as applicable to the project:</p> <p><input type="checkbox"/> Includes an engagement method other than a town hall or presenting a set of options to a selected group for feedback.</p> <p><input type="checkbox"/> Includes engagement of the general public (citizens and residents).</p> <p><input type="checkbox"/> Facilitation services in English</p> <p><input type="checkbox"/> Facilitation services in French</p>
	<p>For one (1) of the public engagement projects submitted under R2A.2.1:</p> <ul style="list-style-type: none">• Include the incorporation of the principles of a Gender-based Analysis Plus (GBA+) OR how it could have been incorporated; and• The offeror must detail its impact on the two-way dialogue engagement design and implementation.
	<p>Optional Services - Engaging with Indigenous people (if offered)-</p> <p>One (1) of the public engagement projects submitted under R2A.2.1 must have include engagement with Indigenous peoples.</p> <ul style="list-style-type: none">• Details on how they ensured the design and implementation of the engagement project would be effective in reaching and engaging Indigenous peoples. For this project, services must have been provided in an indigenous language.

12) At Appendix "1" SAMPLE TEMPLATE- PROPOSED PROJECT SUMMARY SHEET-

DELETE:

<p>Digital platform/tool and facilitation:</p>	<ul style="list-style-type: none"> • Demonstrated the delivery through in-house development or sub-contracting of the online presence; • Explained the process for testing online presence; • Explained the processes and capabilities to support troubleshooting and technical support; • Explained how the information was kept reliable and secure (information security); • Demonstrated the facilitator's role during the consultation; • Demonstrated how the rules of engagement were applied; • Demonstrated that facilitation services were executed in French and/or English and/or Indigenous languages;
---	--

AND REPLACE WITH THE FOLLOWING:

<p>Digital platform/tool and facilitation:</p>	<ul style="list-style-type: none"> • Demonstrate the delivery through in-house development or subcontracting of the online platform; • Explain the process for testing the online platform; • Explain the processes and capabilities to support troubleshooting and technical support; • Explain how the information was kept reliable and secure (information security); • Demonstrate the facilitator's role during the consultations; • Demonstrate how the rules of engagement were applied; • Demonstrate that the facilitation services were done in English and French; or English and Indigenous language(s); or French and Indigenous language(s); or French, English and Indigenous language(s); • Demonstrate experience in the use of a variety of techniques to generate online dialogue; • Describe challenges and solutions encountered while providing the online facilitation services, such as dealing with emerging issues and unexpected or unforeseen events; • Demonstrate how data produced were in a format that allowed analysis and could be made available as open data; and • Describe any lessons learned. <p style="background-color: #00FFFF; display: inline-block; padding: 2px;">Check the boxes, as applicable to the project:</p>
---	--

	<ul style="list-style-type: none"><input type="checkbox"/> Includes a digital platform or tool that allows participants to engage at any time.<input type="checkbox"/> Includes at least 500 participants<input type="checkbox"/> Facilitation services in English<input type="checkbox"/> Facilitation services in French<input type="checkbox"/> Facilitation services in an Indigenous language
--	--

13) At Appendix "1" SAMPLE TEMPLATE- PROPOSED PROJECT SUMMARY SHEET-

DELETE:

Analysis, Reporting, and Evaluation:	<ul style="list-style-type: none">• Demonstrated experience in:<ul style="list-style-type: none">○ planning and outlining data collection frameworks;○ planning and outlining the analysis plan• Demonstrated experience in performing quantitative and qualitative analysis using efficient and reliable methods;• Described the challenges and solutions encountered regarding the production of reports and types of reports;• Demonstrated how evaluation was performed or could have been performed, including criteria and how the results were presented• Mentions how many participants were involved and the amount of data analyzed; and• Described any lessons learned. <p>Check the boxes, as applicable to the project:</p> <ul style="list-style-type: none"><input type="checkbox"/> With automated complex text analysis<input type="checkbox"/> Over 10 000 participants <p>For projects with the any of the above boxes checked:</p> <ul style="list-style-type: none">• Described how the quality of the analysis is ensured for text in both official languages. Complex text is at least 50 words.
---	---

AND REPLACE WITH THE FOLLOWING:

**Analysis, Reporting,
and Evaluation:**

- Demonstrated experience in:
 - planning and outlining data collection frameworks;
 - planning and outlining the analysis plan
- Demonstrated experience in performing quantitative and qualitative analysis using efficient and reliable methods;
- Demonstrated the ability to analyze text in both English and French;
- Described the challenges and solutions encountered regarding the production of reports and types of reports;
- Demonstrated how evaluation was performed or could have been performed, including criteria and how the results were presented
- Mentions how many participants were involved and the amount of data analyzed; and
- Described any lessons learned.

Check the boxes, as applicable to the project:

- With automated complex text analysis
- Over 10 000 participants

For projects with the any of the above boxes checked:

- Described how the quality of the analysis is ensured for text in both official languages. Complex text is at least 50 words.

- Text analysis in English
- Text analysis in French

For one (1) of the public engagement projects submitted under R3.1:

- Include the incorporation of the principles of a Gender-based Analysis Plus (GBA+) OR how it could have been incorporated; and
- The offeror must detail its impact on the analysis, reporting, and evaluation.

Solicitation No. - N° de l'invitation
EN578-181138/C
Client Ref. No. - N° de réf. du client
EN578-18-1138

Amd. No. - N° de la modif.
005
File No. - N° du dossier
cy016.EN578-181138

Buyer ID - Id de l'acheteur
cy016
CCC No./N° CCC - FMS No./N° VME

Optional Services - Engaging with Indigenous people (if offered)-

One (1) of the public engagement projects submitted under R3.1 must have include engagement with Indigenous peoples.

- Details on how they analysed, reported, and evaluated engagement with Indigenous peoples. The reporting must have been available in the language of the Indigenous people who were engaged.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.