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Bidders' Conference: Public Engagement and Consultation Services

Request for Standing Offer (RFSO) #EN578-181138/C

Date: August 28, 2019
Time: 2:00 pm EDT



Public Services and
Procurement Canada

Services publics et
Approvisionnement Canada

Canada

Agenda

- 1. Introductory Remarks**
- 2. Introduction of key stakeholders**
- 3. Background and Program Overview**
- 4. PSAB Presentation - ISC**
- 5. Procurement Timeline**
- 6. Procurement and Selection Process**
- 7. Allocation Process**
- 8. Frequently Asked Questions**
- 9. Questions from the participants**



1. Introductory Remarks

- This session will be recorded for reference.
- All materials will be posted in both official languages on buyandsell.gc.ca following the session.
- In case of discrepancy, RFSO documents take precedence over information provided at this session.



2. Introduction of key stakeholders

- Public Services and Procurement Canada (PSPC):
 - Communication Procurement Directorate (CPD): Contracting Authority
 - Privy Council Office (PCO): Technical Authority
 - All inquiries pertaining to this RFSO must be directed in writing to the Standing Offer Authority:

Attention: Christian Schou
Title: Supply Specialist
Telephone: 613-995-2278
Email: Christian.Schou@tpsgc-pwgsc.gc.ca



3. Background and Program Overview pt. 1

- The Government of Canada (GC) engages with the public to give the public the opportunity to participate in decision-making processes through two-way dialogue.
- Public engagement is a democratic process that must be [transparent, relevant, inclusive, accountable and adaptable](#). In order to have an effective and open two-way dialogue, the GC uses a variety of approaches. The GC aims to consider the public's input in decision making and to report on it.
- The GC seeks the services of firms to undertake services related to public engagement activities, including public consultations, on an as- and when-required basis.



3. Background and Program Overview pt. 2

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



3. Background and Program Overview pt. 3

- Offerors that are successful pursuant to this RFSO process will be automatically pre-qualified under the Request for Supply Arrangement (RFSA) process (if they opted-in to “automatic” qualification in their submitted APPENDIX “2” OFFEROR’S CHOICE – SUB-CATEGORIES OF SERVICE SELECTION)).
- This RFSO will also be used to establish a separate list of qualified Aboriginal Set-Aside Offerors (PSAB). ***(Please, refer to ISC presentation for more information on PSAB).***
- The Standing Offer (SO) and the Supply Arrangement (SA) include the delivery of services in areas subject to Comprehensive Land Claims Agreements (CLCAs). ***(Please, refer to ISC presentation for more information on CLCAs).***



PSAB Presentation

5. Procurement Timeline

Key Activities	Timeline
RFSO published on BuyandSell.gc.ca	August 9, 2019
Bidders Conference	August 28, 2019
End of Solicitation Enquiry Period	7 days prior to bid Closing
Bid Closing	Check buyandsell
Standing Offers and Supply Arrangements issuance	Winter 2019



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6. Procurement and Selection Process

- A. Submission of Offers
- B. Phased Offer Compliance Process
- C. Offer Preparation Instructions
- D. Offer Submission Requirements
- E. Security Requirements
- F. Basis of Selection
- G. Mandatory Technical Criteria
- H. Point-rated Criteria Summary

A. Submission of Offers pt. 1

Offer submission deadline:

Please check buyandsell.gc.ca

Hard Copy Delivery Address:

Bid Receiving - PWGSC

11 Laurier St., Phase III, Place du Portage Core 0B2

Gatineau, Québec K1A 0S5

Canada

Email Address to Register for ePost Connect

(recommend registering 5+ days before closing date):

[TPSGC.DGAreceptiondessoumissions-
ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca)



A. Submission of Offers pt. 2

Reminder:

Transmission of offers by facsimile to PWGSC will not be accepted.



B. Phased Offer Compliance Process

Addressed in detail in Part 002 of Amendment 002 of the RFSO.

- The Phased Offer Compliance Process applies to this requirement.
- It provides offerors with greater flexibility to demonstrate compliance with mandatory requirements after the solicitation closing date.
 - **Examples:** missing signatures or missing pages in the technical proposal.



C. Offer Preparation Instructions

- Addressed in detail in Part III of RFSO – Offer Preparation Instructions
- Offerors must be mindful of the RFSO instructions
- Deviations from the requirements of the RFSO may render offers non-compliant



D. Offer Submission Requirements

Please see article 3.1.4 of Part 3 - Offer Preparation Instructions

E. Security Requirements

The detailed security requirements associated with this procurement will be included in a future solicitation amendment.

At this time, we can confirm the following:

- There will be multiple Security Requirements Check lists (SRCL) to address varying security requirements that could come up for this type of service.
- Client departments will determine the security level that applies to their specific project.
- The allocation process for call-ups will only include Offerors that are cleared up to each project's required security level (as determined by the client department).
- Security clearances will not be required before the closing date of this RFSO.



F. Basis of Selection - part 1

Addressed in detail in Part 4 of RFSO – Evaluation Procedures and Basis of Selection

1. To be declared responsive, an offer must:
 - a) comply with all the requirements of the RFSO; and
 - b) meet all mandatory technical criteria; and
 - c) Obtain the required minimum of 70 percent of the available points for each rated criteria in a Sub-Category offered. As each Sub-Category is performed on a different scale, please refer to Annex “D” of the RFSO for full details.

2. Offers not meeting (a), (b) and (c) will be declared non-responsive.

F. Basis of Selection - part 2

3. The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be **70%** for the technical merit and **30%** for the price.
4. To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **70%**.
5. To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of **30%**.
6. For each responsive offer, the technical merit score and the pricing score will be added to determine its combined rating.



F. Basis of Selection - part 3

7. Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Sub-Category, the responsive offer(s) which obtain a passing score for the combined rating of technical merit and price for each particular Sub-Category will be recommended for award of a Standing Offer. Offerors recommended for award of a Standing Offer will also be offered a Supply Arrangement for the same Sub-Categories.



G. Mandatory Technical Criteria

- The mandatory technical criteria are fully described in **Annex “D” – Technical and financial evaluation** of the RFSO.
- Mandatory Criteria will be evaluated on a pass / fail basis (ie compliant or non-compliant submission) and will be subject to the Phase Offer Compliance Process outlined in section 4.1 of the RFSO.

MANDATORY TECHNICAL CRITERIA		Scoring
MA.1	Firm’s Experience	Met/Not met
MA.2	Offeror’s choice – Subcategory Selection	Met/Not met
MA.3	Basis of payment	Met/Not met
MA.4	Offeror Profile	Met/Not met
MA.5	Quality Assurance	Met/Not met
MINIMUM REQUIRED		ALL MET
Offers not meeting all of the mandatory technical criteria will be given no further consideration.		

H. Point-rated Criteria Summary pt. 1

- The point-rated technical criteria are fully described in **Annex “D” – Technical and financial evaluation** of the RFSO.

POINT-RATED TECHNICAL CRITERIA SUMMARY		MINIMUM PASS MARK (Pts)	MAXIMUM POINTS (Pts)
CATEGORY 1: PLANNING AND DEVELOPMENT			
R1A	Subcategory – Expert and Strategic Advice		
R1A.1	Firm’s Experience	63	90
R1A.2	GBA+	7	10
R1A.3	Evaluation Planning Advice	7	10
	<i>Optional Services – Engaging with Indigenous</i>	7	10
TOTAL POINTS FOR R1A			120
R1B	Subcategory – Content Development		
R1B.1	Firm’s Experience	31.5	45
R1B.2	GBA+	7	10
	<i>Optional Services – Engaging with Indigenous</i>	7	10
TOTAL POINTS FOR R1B			65

H. Point-rated Criteria Summary pt. 2

POINT-RATED TECHNICAL CRITERIA SUMMARY		MINIMUM PASS MARK (Pts)	MAXIMUM POINTS (Pts)
CATEGORY 2: IMPLEMENTATION AND FACILITATION			
R2	Project Management		
R2.1	Firm's Experience	63	90
R2.2	GBA+	7	10
	<i>Optional Services – Engaging with Indigenous</i>	7	10
TOTAL POINTS FOR R2			110
R2A	Subcategory A – In-Person		
R2A.1	Logistics Services		
R2A.1.1	Firm's Experience	31.5	45
	<i>Optional Services 1 – Provision of Honoraria and Participant Incentives</i>	7	10
	<i>Optional Services 2 – Planning and Coordinating Travel and Hospitality Arrangements</i>	7	10
TOTAL POINTS FOR R2A.1			65
R2A.2	Two-way dialogue engagement design and implementation		
R2A.2.1	Firm's Experience	63	90
R2A.2.2	GBA+	7	10
	<i>Optional Services – Engaging with Indigenous</i>	7	10
TOTAL POINTS FOR R2A.2			110
TOTAL POINTS FOR R2A			175
R2B	Subcategory B – Online		
R2B.1	Digital Platform/Tool and Facilitation		
R2B.1.1	Firm's Experience	63	90
TOTAL POINTS FOR R2B			90

H. Point-rated Criteria Summary pt. 3

POINT-RATED TECHNICAL CRITERIA SUMMARY		MINIMUM PASS MARK (Pts)	MAXIMUM POINTS (Pts)
CATEGORY 3: ANALYSIS, REPORTING AND EVALUATION			
R3	Analysis, Reporting and Evaluation		
R3.1	Firm's Experience	63	90
R3.2	GBA+	7	10
	<i>Optional Services – Engaging with Indigenous</i>	7	10
TOTAL POINTS FOR R3			110
R4	Quality Assurance		
R4.1	Quality Assurance Comprehensive Statement	21	30
TOTAL POINTS FOR R4			30
<ul style="list-style-type: none"> ▪ <i>Offerors that fail to meet the minimum points in each rated criterion will not be evaluated further and will be considered non-responsive.</i> 			

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7. Allocation Process Summary – Step 1

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.

7. Allocation Process Summary – Step 2

STEP 2			
Short-List Qualified Offerors	A	B	C
	If the generated list includes 2 or fewer Offerors	If the generated list includes 3 or 4 Offerors	If the generated list includes 5 or more Offerors
<p>The Project Authority will be invited to select from a short-list of Offerors that will vary based on the number of Qualified Offerors for the specific combination of requested services and security clearance levels.</p>	<p>One option is provided to the Project Authority:</p> <ul style="list-style-type: none"> • Best Value Offeror from the generated list for the requested combination of Categories <p>If rejected by the Best Value Offeror, the other qualified Offeror from the generated list is offered the call-up</p>	<p>Two options are provided to the Project Authority:</p> <ul style="list-style-type: none"> • Best Value Offeror from the generated list for the requested combination of Categories; and • the next rotational Offeror in the generated list that is different. 	<p>Three options are provided to the Project Authority:</p> <ul style="list-style-type: none"> • Best Value Offeror from the generated list for the requested combination of Categories; and • Offeror from the list that is furthest away from its proportional share for the requested combination of Categories and is different from the Best Value Offeror; and • the next rotational Offeror in the generated list that is different.

7. Allocation Process Summary – Step 3

STEP 3 (if applicable)

Select Offeror

For STEP 2B and 2C, the Project Authority will consider available information on Offeror expertise to select an Offeror from the options provided.

EXCEPTIONS (if applicable)

Select Offeror

For Step 2B and Step 2C, if a selected Offeror turns down a call-up, the Project Authority will be provided the following options:

- the remaining Offerors that have already been presented to the Project Authority; and
- the Offeror from the generated list that is furthest away from their proportional share and has not already been offered to the Project Authority, if any.



Questions?

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8. Frequently Asked Questions pt. 1

Questions	Answers
1. If I did not attend this information session, can I still submit an offer?	Yes
2. Will the list of attendees be published?	No
3. Will the questions and answers be published?	Yes. To ensure an open, fair and transparent process, all questions and answers will be published on buyandsell.gc.ca .
4. Will a copy of the presentation be made available?	Yes. A copy of the presentation will be posted on buyandsell.gc.ca in both official languages.



8. Frequently Asked Questions pt. 2

Questions	Answers
5. Can I email my bid?	<p>The submission process is set out in the RFSO Section 2.2.</p> <p>The epost Connect service provided by Canada Post Corporation is the only accepted means of electronic bid transmission.</p>
6. What is the process for questions during the RFSO process?	<p>The process is set out in the RFSO Section 2.4. Questions must be submitted in writing no later than 7 calendar days before the bid closing date.</p>

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9. Questions from participants

All questions from participants (answered at the conference) will be published on BuyandSell.gc.ca in part 001 Questions and Answers of Solicitation Amendment 005.



In Conclusion

- Q&As, amendments and other information regarding this RFSO will be posted as amendments on:
<https://buyandsell.gc.ca/procurement-data/tender-notice/PW-CY-016-77563>
- Please direct any enquiries to the Standing Offer Authority at:
Christian.Schou@tpsgc-pwgsc.gc.ca



**Thank you for
attending!**

