



2019-11-08

Standards Council of Canada  
55 Metcalfe Street, Suite 600  
Ottawa ON K1P 6L5  
Canada

*Subject:* **Request for Proposal (RFP) # 2020-11**  
**Planning and facilitation of a series of national consultation workshops.**

This document represents an invitation to Bidders to submit their proposals to the Standards Council of Canada (SCC) to work on the planning and facilitation of a series of national consultation workshops.

In accordance with the Statement of Work attached hereto as Appendix "B", SCC will issue a contract to the successful Bidder, establishing the pricing and terms / conditions under which the development of the above-mentioned standard will be undertaken.

Proposals must be received by SCC no later than **16:00 hours, (4 p.m.) EST on Friday, November 29, 2019**. It is the Bidder's responsibility to deliver their proposal prior to **the time/date of bid closing**. Proposals received after 16:00 hours will not be accepted; they will be returned to the sender unopened.

**PROPOSALS ARE TO BE SUBMITTED ELECTRONICALLY TO [contracts@scc.ca](mailto:contracts@scc.ca)** by the time/date of bid closing (including the financial proposal).

**1. ATTACHMENT 1 – Technical Proposal**

*NOTE: No financial information is to be included in ATTACHMENT 1*

**2. ATTACHMENT 2 – Financial Proposal**

**Proposals that do not contain the requested documentation or deviate from the required financial format (as per Appendix D of SCC RFP #2020-11) may be considered incomplete and disqualified.**

**SCC is not obliged to accept the lowest bid and/or any proposal.**

Questions with respect to the meaning or intent of this process, or requests for correction to any apparent ambiguity, inconsistency or error in the document must be submitted in writing to [contracts@scc.ca](mailto:contracts@scc.ca) and must be received by 12:00 hours (noon) EST on **Monday, November 18, 2019**. All answers will be communicated to all potential bidders via email.

**Request for Proposal # 2020-11**

**Checklist of Documents**

**APPENDIX A: REQUEST FOR PROPOSAL – ACCEPTANCE FORM..... 3**  
**APPENDIX B – STATEMENT OF WORK..... 7**  
**APPENDIX C – EVALUATION CRITERIA ..... 14**  
    **Part A: Mandatory Criteria ..... 16**  
    **Part B: Point-Rated Criteria ..... 16**  
**APPENDIX D – FINANCIAL PROPOSAL ..... 22**

**APPENDIX A: REQUEST FOR PROPOSAL – ACCEPTANCE FORM**

**Proposal Submitted by**

\_\_\_\_\_  
**(Name of Company)**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**(Complete Address)**

**GST/HST Number** \_\_\_\_\_ **BIN Number** \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Contact Email Address: \_\_\_\_\_

1. The Undersigned (hereinafter referred to as “the Bidder”) hereby proposes to the Standards Council of Canada (SCC) to furnish all necessary expertise, supervision, materials, equipment and other incidentals necessary to complete to the entire satisfaction of SCC or their authorized representative, the work described in the Terms of Reference / Statement of Work attached hereto as Appendix “B”.
  
2. The Bidder hereby proposes to perform and complete the work in accordance with the terms and conditions (at the place and in the manner) specified in:
  - (i) Appendix A - attached and entitled “Request for Proposal – Acceptance Form;”
  - (ii) Appendix B - attached and entitled “Statement of Work”;
  - (iii) Appendix C - attached and entitled “Technical Evaluation Criteria”;
  - (iv) Appendix D – attached and entitled “Financial Proposal”.
  
3. **Period of Services**
  - (i) The contract award date is the date that the contract is signed by the Bidder and SCC.
  - (ii) The service start date is the date that the Bidder and SCC agree to commence the work.
  - (iii) The Bidder hereby proposes to perform the work commencing on the service start date and have work completed in accordance with the timeline in Appendix B.

**4. Financial Proposal**

The Bidder hereby proposes to perform and complete the work as per the financials outlined using Appendix D: Financial Proposal Template of SCC RFP #2020-11, which represents the total financial proposal.

**5. Optional Modifications**

In the event that SCC requests the successful Bidder to proceed with any optional modifications or additional changes to the process, payment for this additional work will be based on the per diem rates quoted (see Appendix D of SCC RFP #2020-11).

Authorization to proceed with additional work will be provided by way of a contract amendment as per the established proposal.

#### **6. Optional Years**

SCC may decide, at its discretion, to exercise an option by means of formal contract amendment, to extend the term.

#### **7. Federal Goods and Services Tax (GST) and Harmonized Sales Tax (HST)**

The prices and rates quoted as part of the Bidder's proposal are NOT to include any provision for taxes.

#### **8. Payment Schedule**

As a result of acceptance of the Bidder's proposal, SCC reserves the right to negotiate an acceptable payment schedule prior to the awarding of a contract and/or any amendments.

#### **9. Appropriate Law**

Any contract awarded by SCC as a result of SCC RFP #2020-11 shall be governed by and construed in accordance with the laws in force in the Province of Ontario, Canada.

#### **10. Tender Validity**

The Bidder agree(s) that their proposal will remain firm for a period of 90 calendar days after the **the time/date of bid closing**.

**Signatures**

The Bidder herewith submits this bid in accordance with the requirements specified in the Request for Proposal documents.

SIGNED this \_\_\_\_\_ day of \_\_\_\_\_, 2019

Per \_\_\_\_\_  
NAME OF COMPANY

Per \_\_\_\_\_  
(Signing Officer and Position)

Per \_\_\_\_\_  
(Signing Officer and Position)

## **APPENDIX B – STATEMENT OF WORK**

<b>APPENDIX A: STATEMENT OF WORK RFP # 2020-11</b>	
<b>Title</b>	The Standards Council of Canada (SCC) will issue one (1) contract to a Bidder to support the planning and facilitation of a series of national consultation workshops.
<b>SCC Submittal Date</b>	2019-11-08
<b>Vendor Return Date</b>	2019-11-29
<b>Background</b>	<p>All regions of Canada are experiencing environmental, social, and economic impacts that can be attributed to climate change. Adapting standards to ensure infrastructure is climate resilient is critical for Canada and its citizens. Standards can specify performance and material requirements that can be used as the integration point for climate-related risks into infrastructure planning and development processes.</p> <p>Through funding announced in Budget 2016, SCC is working with Canada’s national standardization network to develop and implement standardization solutions that boost infrastructure resilience and create stronger communities for Canadians. SCC’s Infrastructure and Climate Change Program aims to ensure the effectiveness of standards to address climate risks in the design, planning and management of Canadian infrastructure. To accomplish this, the Program is facilitating the development of, over a five-year period from 2016 to 2020, a new toolbox of resources and standardized guidance related to climate change and climate resilience to support both standards users and developers. In parallel, the Program is updating existing, and developing new, standards to enhance climate resilience for all of Canada.</p> <p>As of March 31, 2019, SCC’s Infrastructure and Climate Change Program has launched 31 out of 36 planned projects. SCC published a detailed report on the Program’s progress to date in September 2019.</p> <p>In 2019, SCC will be launching a national campaign. Through the campaign, SCC will seek feedback from engineers, policy makers, standards writers, climatologists, and others involved in the design, building, and maintenance of infrastructure in Canada to determine what standardization gaps exist when in the context of ensuring infrastructure remains resilient to climate change and support the prioritization of future needs.</p> <p>The campaign will take a two-pronged approach: <b>1) remote education and consultation</b>, and <b>2) targeted, in-depth engagement via a series of one-day in-person workshops held in six (6) major cities across the country</b>. The campaign will include a communications component to</p>



	<p>ensure consistent messaging, maintain a unified look and feel, and drive participation.</p> <p>A final report will capture the lessons learned and key insights of the campaign, contextualizing those findings within the broader context of the economic impacts of climate change, and serving as a key input into planning for the future of SCC's Infrastructure Program. Contractors will be engaged to deliver most of the activities, with SCC providing direction and oversight.</p> <p>As such, SCC is seeking a <b>Supplier to support the design, development, administration, logistics, and facilitation of workshops across Canada.</b></p>
<p><b>Scope</b></p>	<p>The chosen Supplier shall support the design, development, administration, logistics, and facilitation of six (6) one-day workshops across Canada including at least one (1) in French or in French and English. It is expected that discussions during the workshops will support SCC's program development as it seeks renewal in 2021.</p> <p>The Supplier will focus on the following major activities:</p> <ul style="list-style-type: none"> <li>• Supporting the design of the workshops including the development of agendas and related materials that will be used;</li> <li>• Managing workshop logistics and administration;</li> <li>• Engaging with key stakeholders in structured discussions via the facilitation of workshops across the country;</li> <li>• Developing short summary reports outlining key messages following each workshop; and</li> <li>• Developing an overarching summary report outlining the key messages heard throughout the engagement period.</li> </ul> <p>What follows is a more detailed overview of the tasks the Supplier will be responsible for, as well as the associated deliverables that are expected:</p> <p><b>Activity 0: Project Initiation</b>  During Project Initiation, the Supplier shall:</p> <ul style="list-style-type: none"> <li>• Meet with SCC to review project goals;</li> <li>• Develop a detailed project workplan for review by SCC; and</li> <li>• Develop a detailed project budget, including milestone dates for invoicing for review by SCC.</li> </ul> <p><i>Deliverable(s)</i>  The expected outputs of Activity 0 will be a detailed workplan and project budget.</p> <p><b>Activity 1: Workshop Design</b>  In collaboration with SCC, the Supplier will be responsible for determining and securing workshop locations and dates for the workshops, as well as developing all associated workshop materials.</p>

*Task 1: Determining workshop locations*

The Supplier will work with SCC to determine where the six (6) workshops will be held. This will involve:

- Identifying possible cities, and confirming their acceptance with SCC;
- Outlining an estimated budget for each chosen city;
- Determining which official language(s) each workshop will be conducted in;
- Proposing possible dates for each workshop; and
- Proposing possible venues for each workshop.

*Task 2: Designing the workshops and developing workshop materials*

The Supplier will work with SCC to develop a facilitation approach, agenda and related workshop meeting materials to support consultations on Canadian needs and future priorities for the Infrastructure Program. This will involve:

- Identifying with SCC the main goals of the workshops;
- Developing a workshop design based on appropriate facilitation methodologies, and a reasonable and adaptable agenda and workbook that will allow for the gathering of feedback from meeting participants;
- Writing and laying out a presentation slide deck and agenda that will be used to facilitate discussions; and
- Professionally editing and translating workshop materials into both official languages (i.e., English and French) where applicable.

*Deliverable(s)*

The expected outputs of Activity 1 will be:

- A list of cities, corresponding dates and budgets for the workshops;
- A facilitation plan;
- An agenda; and
- A suite of workshop materials that reflect the content, as well as look and feel of SCC's Infrastructure Program.

**Activity 2: Engagement and Consultation**

The Supplier will be responsible for planning, designing, and ultimately delivering six (6) full-day face-to-face engagement meetings, with 25-30 key stakeholders attending each, in major cities across the country. This will involve:

*Task 1: Managing meeting logistics*

For each workshop, the Supplier will be responsible for managing meeting hospitality and event services including:

- Securing appropriately-sized, accessible, and comfortable meeting spaces;
- Reserving a hotel block for participants, if required. Note, SCC will not pay for participant accommodations or travel;
- Catering including a light breakfast, lunch, and two coffee breaks;
- Securing web and conference call services, if required;

- Securing technical equipment including, but not limited to, laptops, projection screens, and wireless microphones;
- Preparing, printing, and distributing workshop packages (e.g., agenda, presentation decks, and other materials) to participants in advance electronically, and on the day in hard copy;
- Preparing a list of attendees for name tags and tent cards;
- Ensuring all promotional items are on site (e.g., notepads, brochures, pens, pop-up banners);
- Ensuring various supplies are available (e.g., flip charts, markers); and
- Processing invoices after the meeting.

Note: the budget for each workshop should be approved by SCC in advance of signing any contracts. Workshop costs, as well as travel and accommodations for the facilitator, will be paid for by SCC on an expense-paid basis.

*Task 2: Securing and managing participant attendance*

For each workshop, the Supplier will be responsible for:

- Identifying potential attendees in each city and reviewing their candidature with SCC; and
- Administering invitations (e.g., sending out invitations, answering participant questions, and following-up as necessary with confirmed participants).

Note: SCC will provide the Supplier a list of individuals who could be invited to the workshops. It is expected that this list will be built upon by the Supplier following direction from SCC.

*Task 3: Facilitating the workshops*

Following preparations, full-day workshops will be held in cities across the country. The Supplier will be responsible for:

- On-sight logistical support during the workshops;
- Facilitating discussions to support the Infrastructure and Climate Change Program’s renewal. Topics that may be discussed include:
  - The scope of the current Infrastructure and Climate Change Program;
  - Where the Infrastructure and Climate Change Program should focus future efforts;
  - What each participant’s key priorities are with respect to climate change and standardization; and
  - How to best build capacity to use products developed under the program.
- Promoting a survey (to be developed and administered by SCC) to participants.

*Task 4: Providing a workshop summary*

Following each workshop, the Supplier will be responsible for developing a brief (3-5 page) workshop summary report that includes:

	<ul style="list-style-type: none"> <li>• Final workshop costs;</li> <li>• The number of participants who, including participant names, titles, and organizational affiliations; and</li> <li>• Key messages heard through the workshop, including critical areas where additional standardization or guidance would be useful.</li> </ul> <p><i>Deliverable(s)</i> The main outputs from Activity 2 will be:</p> <ul style="list-style-type: none"> <li>• Potential invitee lists for each workshop (to be validated by SCC);</li> <li>• Six (6) face-to-face meetings in cities across Canada (including all location and hospitality logistics as well as on-site materials);</li> <li>• On-sight logistical and facilitation support for each workshop; and</li> <li>• Workshop summaries following each meeting.</li> </ul> <p><b>Activity 3: Analysis and Recommendations</b> Based on the engagement and outputs of discussions captured throughout the Campaign, the Supplier will be responsible for developing a summary report (15-30 pages) that outlines:</p> <ul style="list-style-type: none"> <li>• The number of sessions held and their location;</li> <li>• The number of participants who attended as well as their characteristics (e.g., geographic region, title, organization);</li> <li>• Critical areas requiring additional standardized guidance;</li> <li>• Recommendations and priorities for the development of future standards; and</li> <li>• A summary of the feedback gathered throughout the workshops.</li> </ul> <p><i>Deliverable(s)</i> The expected output of Activity 3 will be a comprehensive report identifying key messages heard throughout the workshops. This report will feed into a final report to be completed by SCC or another Supplier that captures the lessons learned and key insights from all activities of the campaign, and which contextualizes those findings within the broader context of the economic impacts of climate change.</p>
<p><b>Proposal Requirements</b></p>	<p><b>Proposal Requirements</b> Bidders should prepare a proposal that addresses the requirements of the RFP in two parts: (a) Technical Proposal and (b) Financial Proposal.</p> <p><b>Technical Proposal</b> The Technical Proposal must not exceed 20 pages, excluding appendices. The following information is to be included in the proposal and will be assessed through the bid evaluation process.</p> <p><i>Project Team and Organization:</i> This section should demonstrate the project team and organization’s knowledge, experience, and qualifications to undertake the work. The Bidder must provide a description of the project team and the reporting structure. A summary of the curriculum vitae should be appended and will not constitute part of the 20-page limit set for the proposal.</p>

	<p><i>Methodology and Work Plan:</i> This section should identify a comprehensive methodological approach, and the appropriate assignment of resources, to achieve all aspects of the project as laid out in the statement of work.</p> <p>The section should also identify principal tasks, milestones, and the timeframe for their completion. The Bidder should cite specified events in the timeline where support and/or validation by the project authority will take place. Based on a review of the needs and objectives and the overall proposed approach, provide a description of any major anticipated risks and difficulties, and discuss solutions and strategies for addressing these.</p> <p><b>Financial Proposal</b></p> <p>The Financial Proposal must include a breakdown of the project's costs, including labour costs and other anticipated charges. The payment schedule is to follow the deliverables schedule.</p>
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## **APPENDIX C – EVALUATION CRITERIA**

## **APPENDIX B: EVALUATION CRITERIA**

### **General**

A Technical Evaluation Committee, consisting of at least three (3) SCC or SCC-appointed representatives, will be formed to assess all bids received in response to SCC RFP# 2020-11. The committee will be dissolved subsequent to the successful completion of their duties in selecting the Bidder with whom SCC will contract for the delivery of the project.

Proposals will be evaluated in accordance with the evaluation criteria identified and in conjunction with the Statement of Work (SOW). Bidders are encouraged to address these criteria in sufficient depth in their proposals to permit a full evaluation of their proposals. The onus is on the Bidder to demonstrate that it meets the requirements specified in the solicitation.

Bidders are advised that only listing experience without providing any supporting information to describe where and how such experience was obtained will not be considered to be demonstrated for the purpose of the evaluation. The Bidder should not assume that the evaluation team is necessarily cognizant of, or knowledgeable about, the experience and capabilities of the Bidder or any of the proposed resource(s); as such, any relevant experience must be demonstrated in the Bidders' written proposal. The Technical Proposal must not exceed 20 pages, excluding appendices.

### **Steps in the Evaluation Process**

#### Step 1 – Evaluation against Mandatory Criteria

All bids will be evaluated to determine if the mandatory requirements detailed in *Appendix C Technical Evaluation Criteria: Part A Mandatory Criteria* have been met. Only those bids meeting ALL mandatory requirements will be considered.

#### Step 2 – Evaluation against Point-Rated Criteria

All bids meeting the criteria from Step 1 will be evaluated and scored, in accordance with the point-rated criteria detailed in *Appendix C Technical Evaluation Criteria: Part B Point-Rated Criteria*, to determine the Bidder's Total Technical Merit Score. All bids meeting the minimum thresholds in Step 2 will proceed to Step 3.

#### Step 3 – Evaluation of Financial Proposals

Only technically compliant bids meeting all of the requirements detailed in Steps 1 and 2 will be considered at this point.

Bidders must provide a price for each item identified in the format specified in *Appendix D Financial Proposal*. Ranges (e.g., \$10-\$13) are not acceptable.

#### Step 4 – Basis of Selection

The selection will be based on the highest combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

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 70%. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%. In the event of a tie, the proposal receiving the highest score for the technical evaluation will be selected.

## Part A: Mandatory Criteria

Proposals will be assessed to determine whether they meet the following mandatory requirements.

Item	Mandatory Requirement	Compliant (Yes/No)
M1	<p>The Bidder must provide a detailed résumé, including work histories, for each of the proposed resource(s) in the following categories. Note: the resources outlined below <u>must</u> be separate individual (i.e., the primary and secondary facilitator cannot be the same person). The Bidder may add additional resources outside of those identified below (e.g., a note taker for during the workshops), however their role(s) must be clearly identified in the Technical Proposal and included in the Financial Proposal.</p> <p>Event Management Team:</p> <ul style="list-style-type: none"> <li>• An Event Manager to oversee the team planning the workshop logistics</li> <li>• An Event Planner(s) to provide logistics for the workshops</li> </ul> <p>Facilitation Team</p> <ul style="list-style-type: none"> <li>• A Primary Facilitator who will attend the workshops and provide facilitation services</li> <li>• A Secondary (or back-up) Facilitator that could facilitate the workshops if the Primary Facilitator is unavailable</li> </ul> <p>Note: The Event Manager should act as team lead for the Event Management Team and would take on activities such as managing the event budgets and preparing invoices for SCC. The Event Planner(s) should work under the direction of the Event Manager and would take on activities such as being the primary contact person(s) with attendees and venues and coordinating AV equipment.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
M2	<p>The Bidder must attest in writing that the Primary Facilitator has the capacity to deliver services in both official languages.</p> <p>Note: Participants should be able to speak in the language of their choice and the proposed resource should be able to summarize their remarks and convey them to the group in the other language, if required.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
M3	<p>The Bidder must attest in writing that they are able to complete the work outlined in the Statement of Work before July 2020.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
M4	<p>The Technical Proposal must not exceed 20 pages, excluding appendices.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Part B: Point-Rated Criteria

The proposal must include a detailed description of the approach, methodology and the work plan describing how the Bidder would carry out the project to achieve the described objectives.



Each proposal will be evaluated against point-rated criteria in the below five (5) categories. A response must be provided for each criterion.

Category	Max. Points
R1: Project Team’s Experience Facilitating Workshops	30
R2: Project Team’s Experience Organizing Workshops	30
R3: Methodology and Work Plan	25
R4: Quality of Proposal	5
<b>Total Possible Points</b>	<b>90</b>

63 of the possible 90 points must be achieved (70%) in order for the financial elements of the bid to be evaluated.

### R1 Project Team’s Experience Facilitating Workshops

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below. “Recent” means within the last three years.

Item	Rated Criteria	Max points
<b>R1A</b>  The Bidder should provide <b>three</b> examples of projects that demonstrate the proposed <b>Primary Facilitator’s</b> experience in group facilitation with multi-stakeholder groups	For each example, points will be awarded as follows: <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example is somewhat related in size, number, scope, complexity, relevance and/or similarity of participants (i.e., engineers, policy makers, design professionals)</li> <li>- <b>Up to 5 points</b> if the example is clearly related in size, number, scope, complexity, relevance and/or similarity of participants</li> </ul>	<b>15</b>
<b>R1B</b>  The Bidder should provide <b>one</b> examples of a project that demonstrates the proposed <b>Primary Facilitator’s</b> experiencing facilitating workshops on a topic related to impacts, risks, and/or adaptation/mitigation practices related to climate change	For each example, points will be awarded as follows: <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example somewhat relates to facilitating workshops on topics related to climate change</li> <li>- <b>Up to 5 points</b> if the example is clearly related to facilitating workshops on topics related to climate change with the purpose of making decisions</li> </ul>	<b>5</b>
<b>R1C</b>  The Bidder should provide <b>one</b> examples of a project that demonstrates the proposed <b>Secondary (back-up) Facilitator’s</b> experience in group facilitation with multi-	Points will be awarded as follows: <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example is somewhat related in size, number, scope, complexity, relevance and similarity of participants (i.e., engineers, policy makers, design professionals)</li> <li>- <b>Up to 5 points</b> if the example is clearly related in size, number, scope, complexity, relevance</li> </ul>	<b>5</b>

stakeholder groups	and similarity of participants	
<b>R1D</b>  The Bidder should provide <b>one</b> recent example that demonstrates that the proposed <b>Primary Facilitator</b> has experience synthesizing information gathered through a facilitated workshop(s)	The example should outline (a) the number and type of stakeholders involved in the workshop, and (b) how the information was synthesized and how it was intended to be used by the client. Points will be awarded as follows:  - <b>Up to 3 points</b> if the example demonstrates the proposed Primary Facilitator has experience synthesizing information gathered through a workshop(s)  - <b>Up to 5 points</b> if the example demonstrates the proposed Primary Facilitator has experience developing a report(s) by synthesizing information gathered through a workshop(s) for the purpose of strategic or business planning	<b>5</b>

**R2 Project Team’s Experience Organizing Workshops**

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below. “Recent” means within the last three years.

Item	Rated Criteria	Max points
<b>R2A</b>  The Bidder should provide an overview of the <b>Event Manager’s</b> experience. The bid should include the Event Manager’s CV and a description of relevant Project Summaries  Points will be awarded for three criteria: completion of a recognized education program, experience in event management, and experience managing project relations	Points will be awarded as follows:  - <b>Up to 3 points</b> for the successful completion of an undergraduate degree from a recognized university or a diploma and/or certificate from a college in either Event or Hospitality Management or a similar related field  <b>Plus</b>  - <b>Up to 4 points</b> for relevant experience in leading the development and execution of medium scale events (where the firm’s assigned portion of the overall budget was at least \$50,000 OR where there was a minimum of 30 participants)  <b>Plus</b>  - <b>Up to 3 points</b> for relevant experience in effectively managing project relations between multiple stakeholders (including the client, sub-contractors, and other stakeholders)	<b>10</b>

Item	Rated Criteria	Max points
<p><b>R2B</b></p> <p>The Bidder should provide <b>two recent examples</b> that demonstrate that the proposed Event Management Team has relevant experience in managing the logistics for events or other similar projects</p> <p>Note: the examples must come from projects led by the proposed Event Manager, but do not require all members of the Event Management Team to be involved</p>	<p>For each example, points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example is somewhat related in size, number, scope, complexity, relevance and/or similarity of participants (i.e., engineers, policy makers, design professionals) to the workshops described in the SOW</li> <li>- <b>Up to 5 points</b> per project if the example is clearly related in size, number, scope, complexity, relevance and/or similarity of participants to the workshops described in the SOW</li> </ul>	<p><b>10</b></p>
<p><b>R2C</b></p> <p>The Bidder should provide <b>one recent example</b> demonstrating that the Project Team has experience designing agenda(s) and workshop materials in both official languages (i.e., French and English)</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example somewhat demonstrates how the Bidder supported the development of a workshop agenda and one or more accompanying workshop materials (e.g., presentation decks, workbooks, in-session surveys) in both French and English</li> <li>- <b>Up to 5 points</b> if the example clearly demonstrates how the Bidder supported the development of a workshop agenda and two or more accompanying workshop materials in both French and English</li> </ul>	<p><b>5</b></p>
<p><b>R2D</b></p> <p>The Bidder should provide <b>one example</b> demonstrating the Project Team has experience supporting or leading the design of workshops of similar complexity. The example should demonstrate what was considered when designing the workshops (e.g., methodologies, facilitation practices, stakeholder or client input).</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the example somewhat demonstrates how the Bidder supported or led the design of a workshop of similar size, scope, and/or complexity to the workshops described in the SOW. The methodology and factors considered when designing the workshop are provided but are missing some details or limited in their explanation.</li> <li>- <b>Up to 5 points</b> if the example clearly demonstrates how the Bidder supported or led the design of a workshop of similar size, scope, and/or complexity to the workshops described in the SOW. The methodology and factors considered when designing the workshop are clearly explained.</li> </ul>	<p><b>5</b></p>

### R3: Methodology and Work Plan

The Bidder must provide a thorough description of the proposed approach and methodology. The basis for scoring with respect to each criterion is provided in the table below.

Item	Rated Criteria	Max points
<p><b>R3A</b></p> <p>The Bidder should demonstrate a comprehensive methodological approach, and appropriate assignment of resources, to achieve all aspects of the project</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if the description of the methodological approach is incomplete, missing some details, or is not realistic or technically feasible</li> <li>- <b>Up to 6 points</b> if the description of the methodological approach is detailed enough to include a description of the steps that will be undertaken to meet each deliverable outlined in the SOW but is missing some details</li> <li>- <b>Up to 10 points</b> if the description of the methodological approach is detailed enough to include a description of the steps that will be undertaken to meet each deliverable outlined in the SOW; the approach and method must be complete, realistic, technically feasible, and tailored to the expected outputs of the workshops</li> </ul>	<p><b>10</b></p>
<p><b>R3B</b></p> <p>The Bidder should outline a clear work plan to ensure the objectives of the Project are met.</p> <p>The work plan should identify, at a minimum, the Bidder's understanding of the goals and objectives of the project, resources that will be employed, constraints, and a project schedule (a diagram such as a Gantt chart may be provided, but must be clearly readable)</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- <b>Up to 4 point</b> if the work plan addresses some objectives of the project and some elements of the critical path, with some explanation of how the timelines were determined, and a cursory overview of what resources will be utilized.</li> <li>- <b>Up to 7 points</b> if the work plan addresses most objectives of the project and most elements of the critical path, with an explanation of how the timelines were determined, the resources to be utilized, and some key underlying assumptions.</li> <li>- <b>Up to 10 points</b> if the work plan addresses all objectives of the project and all elements of the critical path, with a thorough explanation of how the timelines were determined, the resources to be utilized, and any key underlying assumptions. The schedule should also identify events in the timeline where</li> </ul>	<p><b>10</b></p>

Item	Rated Criteria	Max points
	support and/or validation by SCC will take place.	
<b>R3C</b>  The Bidder should demonstrate a clear risk mitigation strategy	Points will be awarded as follows:  <ul style="list-style-type: none"> <li>- <b>Up to 3 points</b> if challenges that could arise that would impact the quality and/or delivery of the project, and corresponding mitigating actions, are identified but not clearly described</li> <li>- <b>Up to 5 points</b> if challenges that could arise that would impact the quality and/or delivery of the project, and corresponding mitigating actions, are clearly described and demonstrate a realistic approach and understanding of the project</li> </ul>	<b>5</b>

**R4: Quality of the Proposal**

The Technical Evaluation Committee will assess the quality of the proposal to determine whether the information organized within the proposal is presented in a clear and comprehensive fashion. The Bidder is asked to assure that material within the proposal is formatted, organized and written in such a way as to make clear to the reviewer where responses to mandatory and point-rated requirements are located.

Item	Rated Criteria	Max Points
<b>R4A</b>  The bid should be written in a clear, concise, and professional manner	Points will be awarded as follows:  <ul style="list-style-type: none"> <li>- <b>Up to 1 point</b> if the proposal is poorly organized, difficult to read, and contains frequent typos</li> <li>- <b>Up to 3 points</b> if the proposal is generally well-organized but is somewhat difficult to read and contains some typos</li> <li>- <b>Up to 5 points</b> if the proposal is highly organized, concise, clearly written, and contains very few to no typos</li> </ul>	<b>5</b>

## **APPENDIX D – FINANCIAL PROPOSAL**

**APPENDIX D: FINANCIAL PROPOSAL**

Please complete the below financial template and submit as **ATTACHMENT 2 – Financial Proposal**.

**Notes:**

The financial proposal should outline costs associated with the level of effort required by the project team, and not direct costs associated with the workshops (e.g., meeting room space, catering). Direct costs will be reviewed and approved by SCC prior to each workshop.

Travel and accommodations for the facilitator, as well as any additional resource attending the workshops, will be paid for on an expense-paid basis following approval by SCC. Estimates for travel expenses need not be included in the Financial Proposal.

All figures should be referenced in Canadian currency, pre-tax.

Deliverable as Outlined in the Statement of Work		Level of Effort (Days) Event Management Team	Level of Effort (Days) Facilitator(s)	Level of Effort (Days) Other Proposed Resources*	Cost
Activity 0: Project Initiation					
Activity 1: Workshop Design					
Activity 2: Engagement and Consultation	Workshop #1				
	Workshop #2				
	Workshop #3				
	Workshop #4				
	Workshop #5				
Workshop #6					
Activity 3: Analysis and Recommendations					
Other costs**	<i>Additional cost #1:</i>				
	<i>Additional cost #2:</i>				
	<i>Additional cost #3:</i>				
	<i>Additional cost #4:</i>				
Total:					

\* Other proposed resources, outside of an Event Management Team and Facilitator(s) can be added but must be identified. For example, a note taker for the workshops could be outlined here.

\*\*Please describe any additional anticipated, non-personnel, costs (e.g., printing). Line items can be added as needed