



## RETURN BIDS TO:

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Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

## REQUEST FOR PROPOSAL

## DEMANDE DE PROPOSITION

**Proposal To: Public Works and Government  
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

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

**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

<b>Title - Sujet</b> HC/PHAC Advertising Campaigns	
<b>Solicitation No. - N° de l'invitation</b> HT399-193822/A	<b>Date</b> 2020-02-12
<b>Client Reference No. - N° de référence du client</b> HT399-19-3822	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CZ-008-78477	
<b>File No. - N° de dossier</b> cz008.HT399-193822	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2020-02-27</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Constant, Rachelle	<b>Buyer Id - Id de l'acheteur</b> cz008
<b>Telephone No. - N° de téléphone</b> (613) 990-6696 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF HEALTH 200 Eglantine, A.L. 1914A Attn: Daniel Morier OTTAWA Ontario K1A0K9 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

<b>Delivery Required - Livraison exigée</b> See Herein	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/</b> <b>de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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HT399-19-3822/A  
Client Ref. No. - N° de réf. du client  
HT399-193822

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cz008.HT399-19-3822/A

Buyer ID - Id de l'acheteur  
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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Task Authorization Form, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity - Certification, and the Technical and Financial Evaluation.

### 1.2 Summary

**\*PLEASE NOTE THAT THIS REQUEST FOR PROPOSAL WILL RESULT IN TWO SEPARATE CONTRACTS, ONE FOR HEALTH CANADA CAMPAIGNS OUTLINED IN ANNEX "A1", AND A SECOND FOR PUBLIC HEALTH AGENCY OF CANADA CAMPAIGNS OUTLINED IN ANNEX "A2".**

**DETAILS ON THE BASIS OF SELECTION IS INCLUDED IN PART 4, 4.2 BASIS OF SELECTION.**

Health Canada is seeking **two (2)** lead marketing and advertising creative agencies to provide a full range of creative development and advertising-related services for:

- 1) **Health Canada** advertising and marketing campaigns.
- 2) **Public Health Agency of Canada** advertising and marketing campaigns.

Services could include:

- Providing overall strategic campaign direction
- Developing creative strategy and managing production (including trafficking of files to media when required)
- Collaborating with Agency of Record on elaboration of respective creative and media strategies to ensure alignment and integration between media and creative
- Offering strategic oversight and advice, including on-going and wrap up evaluation, as required

Each of the two contracts will be from date of award until March 31, 2021 with the possibility of three (3) additional one (1) year irrevocable option periods. The services must be carried out as described in

Annex "A1", Statement of Work – Health Canada, and Annex "A2", Statement of Work – Public Health Agency of Canada.

The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).

The requirement is limited to Canadian services.

There is a Federal Contractors Program (FCP) for employment equity requirement associated with this procurement; see Part 5 - Certifications, Part 7 - Resulting Contract Clauses and the annex named Federal Contractors Program for Employment Equity - Certification.

This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.

This bid solicitation is to establish a contract with task authorizations for the delivery of the requirement detailed in the bid solicitation to the Identified Users across Canada, excluding locations within Yukon, Northwest Territories, Nunavut, Quebec, and Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirement for deliveries within CLCAs areas within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador will have to be treated as a separate procurement, outside the resulting contract.

### **1.3 Debriefings**

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

### **1.4 Recourse for suppliers with respect to the Procurement Process**

Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority.

There are several mechanisms available to suppliers to address concerns they may have related to federal government procurement, such as: the Office of the Procurement Ombudsman (OPO), the Canadian International Trade Tribunal (CITT), the Competition Bureau, and before the Federal Court of Canada and any of Canada's provincial superior courts.

Regardless of the forum to which a supplier brings a complaint, there are strict timelines for filing complaints. Additional information can be found at Canada's Buy and Sell website at [www.buyandsell.gc.ca](https://buyandsell.gc.ca) under the heading "Supplier Dispute Management Process".

## **PART 2 - BIDDER INSTRUCTIONS**

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

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

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

The [2003](#) (2019-03-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days  
Insert: 150 days

## 2.2 Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the bid solicitation.

Note: For bidders choosing to submit using epost Connect for bids closing at the Bid Receiving Unit in the National Capital Region (NCR) the email address is:

[tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca)

Note: Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions [2003](#), or to send bids through an epost Connect message if the bidder is using its own licensing agreement for epost Connect.

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

## 2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

### Definitions

For the purposes of this clause, "*former public servant*" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

### Former Public Servant in Receipt of a Pension

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

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

### Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes ( ) No ( )**

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

## 2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must

be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## **2.5 Applicable Laws**

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

## **2.6 Basis for Canada's Ownership of Intellectual Property**

The department of PWGSC has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following: the material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

# **PART 3 - BID PREPARATION INSTRUCTIONS**

## **3.1 Bid Preparation Instructions**

If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid  
Section II: Financial Bid  
Section III: Certifications

If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (6 hard copies and 1 soft copy on USB key)  
Section II: Financial Bid (1 hard copy and 1 soft copy on USB key)  
Section III: Certifications (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 Bidder is simultaneously providing copies of its bid 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.

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



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

## **Section I: Technical Bid**

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

## **Section II: Financial Bid**

**3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B".

### **3.1.2 Electronic Payment of Invoices – Bid**

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

If Annex "D" 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 Exchange Rate Fluctuation**

C3011T (2013-11-06), Exchange Rate Fluctuation

## **Section III: Certifications**

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

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

### **4.1 Evaluation Procedures**

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

#### **4.1.1 Technical Evaluation**

Mandatory and point rated technical evaluation criteria are included in Annex "F".

#### **4.1.2 Financial Evaluation**

Financial evaluation criteria are included in Annex "F".

## 4.2 Basis of Selection

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all mandatory criteria; and
- (c) obtain the required minimum points specified for each criterion for the technical evaluation;

The rating is performed on a scale of 90 points.

Bids not meeting (a), (b) or (c) will be declared non-responsive.

- 2. The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% for the price.
- 3. 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 80%.
- 4. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20%.
- 5. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted.

The **two (2)** responsive bids with the highest combined rating of technical merit and price will be recommended for award of a contract. Health Canada will make the final determination, at its discretion, which of the two (2) responsive bids is recommended for each of the two (2) resulting contracts (Annex A1 for Health Canada, and Annex A2 for Public Health Agency of Canada).

## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

### 5.1 Certifications Required with the Bid

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

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

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

## 5.2 Certifications Precedent to Contract Award and Additional Information

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

### 5.2.1 Integrity Provisions – Required Documentation

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

### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### 5.2.3 Additional Certifications Precedent to Contract Award

#### 5.2.3.1 Canadian Content Certification

This procurement is limited to Canadian services.

The Bidder certifies that:

( ) the services offered are Canadian services as defined in in paragraph 2 and 4 of clause A3050T.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**5.2.3.1.1** SACC Manual clause [A3050T](#) (2010-08-16) Canadian Content Definition

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### 5.2.3.2 Status and Availability of Resources

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.3.3 Education and Experience

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.3.4 Capability of Resources

The Bidder or Joint Venture entity certifies that it has in-house resources, capable of meeting roles and responsibilities (as outlined in Annex "A1" and "A2") of the following key categories of service:

- Account Management and Coordination Services – Resource(s) must have minimum 3 years in the key category of service
- Strategic Services – Resource(s) must have minimum 3 years in the key category of service
- Creative and Production Services – Resource(s) must have minimum 3 years in the key category of service

( ) YES    ( ) NO

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Financial Capability

SACC Manual clause [A9033T](#) (2012-07-16) Financial Capability

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 7.1 Statement of Work

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

## 7.1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

### 7.1.2.1 Task Authorization Process

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex C.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within three (3) calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

### 7.1.2.2 Task Authorization Limit

The Project Authority may authorize individual task authorizations up to a limit of \$250,000.00, Applicable Taxes included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Project Authority and Contracting Authority before issuance.

### 7.1.2.3 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause, "Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and "Minimum Contract Value" means \$15,000.00.
2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

## 7.2 Standard Clauses and Conditions

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

### 7.2.1 General Conditions

[2035](#) (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

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## 7.2.2 Supplemental General Conditions

4007 (2010-08-16), Supplemental General Conditions – Canada to Own Intellectual Property Rights in Foreground

## 7.3 Security Requirements

**7.3.1** There is no security requirement applicable to the Contract.

## 7.4 Term of Contract

### 7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2021.

### 7.4.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to three (3) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Rachelle Constant  
Procurement specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Communication Procurement Directorate  
Address : 360 Albert street, 12th floor, Ottawa (Ontario) K1A 0S5

Telephone : 613-290-4035  
Email : rachelle.constant@pwgsc.gc.ca

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

### 7.5.2 Project Authority (*to be inserted at Contract Award*)

The Project Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_

Solicitation No. - N° de l'invitation  
HT399-19-3822/A  
Client Ref. No. - N° de réf. du client  
HT399-193822

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cz008.HT399-19-3822/A

Buyer ID - Id de l'acheteur  
cz008  
CCC No./N° CCC - FMS No./N° VME

Address: \_\_\_\_\_

Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_

Facsimile: \_\_\_\_-\_\_\_\_-\_\_\_\_

E-mail address: \_\_\_\_\_

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

### 7.5.3 Contractor's Representative (to be inserted at Contract Award)

The Contractor's Representative for the Contract is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_-\_\_\_\_-\_\_\_\_

E-mail address: \_\_\_\_\_

### 7.6 Proactive Disclosure of Contracts with Former Public Servants

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

### 7.7 Payment

#### 7.7.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are excluded and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

#### 7.7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_ (to be inserted at Contract Award). Customs duties are excluded and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- (a) when it is 75 percent committed, or
  - (b) four (4) months before the contract expiry date, or
  - (c) as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### **7.7.3 Method of Payment**

#### **7.7.3.1 Monthly Payment**

SACC Manual Clause H1008C (2008-05-12) Monthly Payment

#### **7.7.4 T1204 - Direct Request by Customer Department**

SACC Manual Clause A9117C (2007-11-30) - T1204 - Direct Request by Customer Department

#### **7.7.5 Discretionary Audit**

SACC Manual Clause C0705C (2010-01-11) - Discretionary Audit

#### **7.7.6 Time Verification**

SACC Manual Clause C0711C (2008-05-12) - Time Verification

#### **7.7.7 Electronic Payment of Invoices – Contract (to be revised at Contract Award)**

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

### **7.8 Invoicing Instructions**

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- (a) category of services and names of resources, number of hours per category and hourly rates;
  - (b) a copy of time sheets to support the time claimed;
  - (c) a copy of the release document and any other documents as specified in the Contract;
  - (d) a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
  - (e) a copy of the monthly progress report, as applicable.
2. Invoices must be distributed as follows:
- (a) The original and one (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.
  - (b) One (1) **electronic** copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.



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## 7.9 Certifications and Additional Information

### 7.9.1 Compliance

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

### 7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

### 7.9.3 SACC Manual Clauses

SACC Manual Clause [A3060C](#) (2008-05-12) - Canadian Content Certification

## 7.10 Applicable Laws

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

### 7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4007 (2010-08-16);
- (c) the general conditions 2035 (2018-06-21);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Task Authorization Form;
- (g) the signed Task Authorizations (including all of its annexes, if any); and
- (h) the Contractor's bid dated \_\_\_\_\_ **(to be inserted at Contract Award)**.

### 7.12 Foreign Nationals (Canadian Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor)

### 7.13 Insurance

SACC Manual clause [G1005C](#) (2016-01-28) Insurance - No Specific Requirement

### 7.14 Conflicting Interest

"CONFLICT OF INTEREST" means, in addition to the provisions of General Conditions 2035-34, any direct or indirect personal or financial interest, relationship, activity, situation or circumstance as a result of which the Contractor is unable or may appear unable to provide impartial and objective assistance, advice or services to Canada.

1. Subject to subsection (2), the Contractor represents, warrants and must ensure that, to its knowledge, the services to be provided pursuant to this Contract (the "Work") are not, and will not, during the course of the period of the contract, be in conflict with competing or opposing interests of other clients of the Contractor.
2. Where the Contractor is aware that the Work is or may be in conflict with interests of other clients of the Contractor, the Contractor must identify the potentially competing services and interests involved, and forward an explanation setting out the reasons why the situation would not represent a conflict of interest.
3. Where Canada becomes aware that the Work is or may be in conflict with interests of other clients of the Contractor, Canada will inform the Contractor of this situation, requesting an explanation setting out the reasons why the situation would not represent a conflict of interest.
4. Following a review of the Contractor's explanation, Canada may accept or reject the explanation, at the sole discretion of Canada. Canada will deliver its decision in writing. The Contractor will have a ten (10) working days, from the date of receipt of Canada's decision, to submit either a supplementary or an alternate explanation. Following a review of the Contractor's supplementary explanation, if any, Canada may either accept or agree with this supplementary explanation, or, at the sole discretion of Canada, proceed to the measures set out in subsection 5.
5. Where Canada rejects the Contractor's initial explanation (or supplementary explanation, if any) referred to in subsection (4), Canada may terminate the contract in accordance with subsection (6).
6. The Contractor agrees that Canada relies upon subsection (1) to authorise the Contract and any breach of subsection (1) will entitle Canada to terminate this contract for default.

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## ANNEX "A"

### STATEMENT OF WORK

#### ANNEX "A1" - STATEMENT OF WORK – HEALTH CANADA

##### 1. INTRODUCTION

Health Canada is seeking a lead marketing and advertising creative agency to provide a full range of creative development and advertising-related services for various **Health Canada** marketing campaigns.

Services could include:

- Providing overall strategic campaign direction
- Developing creative strategy and managing production (including trafficking of files to media when required)
- Collaborating with Agency of Record on elaboration of respective creative and media strategies to ensure alignment and integration between media and creative
- Offering strategic oversight and advice, including on-going and wrap up evaluation, as required

##### 2. BACKGROUND

Health Canada is the federal department responsible for helping the people of Canada maintain and improve their health. Health Canada is committed to improving the lives of all of Canada's people and to making this country's population among the healthiest in the world as measured by longevity, lifestyle and effective use of the public health care system.

One of Health Canada's core roles is to be an information provider to ensure that Canadians are informed of and protected from health risks associated with food, products, substances and environments, and the benefits of healthy eating. For Canadians to make informed choices related to their health, they need timely, accurate, clear, and objective information delivered in formats that are easily accessible, tailored to their information preferences, reflective of their knowledge and circumstances, and delivered in both official languages. The coordination of national health-related communications and marketing activities are a key component of the communications approach used in raising awareness and providing information about health topics.

Health Canada's *Marketing, Partnerships and Creative Services Division* (MPCSD) provides communications-related services to Health Canada and the Public Health Agency of Canada (PHAC). From year to year, MPCSD manages a number of small to large-scale marketing campaigns on various topics and reaches out to diverse target audiences that make up the Canadian public (segmented in a variety of manners), healthcare professionals and various stakeholders. Topics and areas of focus vary dependent on departmental and Government of Canada (GC) priorities. Relevant topics may also emerge as the years develop.

HC campaign topics may include:

- Healthy living
- Tobacco cessation
- Vaping prevention

- Food and nutrition
- Drugs and health products (not including the controlled substances and illicit drugs as defined below)
- Environmental and workplace health
- Consumer product safety
- Health or health care regulations and/or consultations
- Health science and research

MPCSD wishes to establish contract with one Lead Agency (Contractor) that allows for the appropriate campaign planning, creative development and execution of key marketing activities that support Health Canada's mandate. A separate contract (see Statement of Work – Public Health Agency of Canada) will be issued for work supporting PHAC's mandate.

It is expected that the Contractor will develop immediate, short-term and long-term tactics to support HC activities and align initiatives nationally as the need arises. The Contractor must be able to provide a full range of marketing activity planning, development and implementation that can include, but is not limited to:

- Advertising creative strategy, production and trafficking (including television, digital video, mobile, social media, print, radio, out of home and others)
  - The Contractor must provide information and materials to other contractors of the GC, if requested, to test creative concepts as well as evaluate audience impact using HC pre-and-post-campaign surveys.
- Strategic marketing advice and development of non-advertising tactics, including:
  - digital, animated, mobile, social media, infographics, podcasts (including other new technologies)
  - print products such as posters, brochures, etc.
  - partnership building with trusted intermediaries (including professional associations and direct to industry communication) and production of supporting resources.

While most initiatives are planned in advance, MPCSD requires Contractor that can also deal with pressing, urgent or emergency-driven marketing that may arise. In the event of a health emergency or crisis, public communications, including marketing and advertising, will be essential to supporting and enhancing HC's response efforts.

Creative development and advertising-related services for campaigns with smaller budgets is generally undertaken by MPCSD with in-house support services. This contract is being set up for outsourcing of projects requiring more complex or significant production support (e.g. mid-to-large scale campaigns) for which a full-service advertising creative agency may be best suited to address, and to assist with surge capacity when required.

*This contract does not include:*

- Media strategy development, media planning and buying, event-based marketing or experiential events and influencer marketing. The tactics may be recommended as a part of the overall marketing strategy, but the planning and implementation of these tactics would be part of

separate contracts or be subject to existing contracts ex: the Government of Canada's Agency of Record.

- Controlled substances and illicit drugs: HC and/or MPCSD reserves the right to issue a separate contract for campaigns related to controlled substances as the need arises. A controlled substance is any type of drug that the federal government has categorized as having a higher-than-average potential for abuse or addiction and range from illegal street drugs to prescription medications. This does not include tobacco cessation or vaping prevention, as listed under HC topics.

### **3. OBJECTIVES AND PURPOSE**

The overarching objective and common goal of HC marketing activities are to provide Canadians with targeted, timely, relevant, comprehensive and accessible information to assist them in making informed decisions to protect their health.

Tools and tactics achieve the following communications goals:

- Increase awareness and knowledge among Canadians, particularly key target audiences and vulnerable populations, about health risks and how they can protect their immediate and long-term health for themselves and their families.
- Influence health attitudes and behaviours among the target audiences.
- Demonstrate leadership and build HC's credibility as a trusted source of health information.
- Increase knowledge of the Department's policies and priorities, as well as programs.

Campaigns often include multiple target audiences (with complementary messages and tactics). Campaigns targeted to health professionals and other stakeholders (e.g. industry) have similar overarching goals of awareness, knowledge and uptake.

### **Expected Results**

These marketing activities are expected to increase dissemination and uptake of HC's information and resources by Canadians (including health professionals) and health organizations.

### **4. KEY CAMPAIGN MESSAGES**

Tailored messages for each HC priority files will be developed as part of any task authorization established within this contract

Given the responsibilities of other governmental departments concerning health topics, it will be essential to work closely with federal partners to ensure messages are clear, consistent and complementary.

## 5. TARGET AUDIENCES

Target audiences will be determined with each marketing activity and may include multiple target audiences such as: children, youth, teens, young adults, adults, seniors, parents (of babies, children, teens or young adults), people with a compromised immune system, pregnant women, students, renters, homeowners, Indigenous peoples, new Canadians, stakeholders and/or health intermediaries.

## 6. ENVIRONMENTAL CONSIDERATIONS

Environmental considerations will be determined with each marketing activity. Overall research indicates:

- Canadians prefer a streamlined way to get consistent, reliable information regarding health and safety issues and it is important with a digital first approach to communications to ensure we meet Canadians where they are online
- Canadians already know basic information on a multitude of topics related to health and safety, but their knowledge levels of these topics vary.
- Information must be made available to Canadians in a way that is user friendly and useful to them. Visitors to the website should be able to search for information that is relevant to their needs, and have the flexibility to receive that information in a way that suits them. Social media efforts should be focused on targeting key audiences where they are online, providing them with shareable content and identifying other social media influencers that should also be reached to expand reach and impact of messages.
- Tailoring of campaign messages to reach specific target audiences may require a wide variety of platforms and methods (i.e. not one-size-fits-all).
- Adaptation/transcreation of resources for the other official language is to take place at the creative strategy and concept stage to ensure the subject matter, tone, environmental factors, and cultural references resonate with the target audience.

## 7. CAMPAIGN EVALUATION

The campaign evaluation will be conducted by Health Canada.

The creative agency will only be expected to provide evaluation analytics and insights on tactics developed and implemented as part of the campaign. Metrics supplied could include public opinion research, focus testing, advertising results, web and social media analytics.

Note: As per the Mandatory Procedures for Advertising of the Government of Canada, for any campaigns above \$1M (excluding fees and taxes) in media buy, institutions must pre-test their advertising campaigns as well as conduct a post-campaign evaluation using the Advertising Campaign Evaluation Tool (ACET). Public opinion research does not form part of this requirement and will be contracted separately by the Government of Canada if needed.

## 8. WORK and CONTRACT CONSTRAINTS

Suppliers should be aware of the following constraints that will affect how the work must be done:

### 8.1 Government of Canada Advertising

Government of Canada advertising is defined as any message conveyed in Canada or abroad and paid for by the government for placement in media, including but not limited to newspapers,

television, radio, cinema, billboards and other out-of-home media, mobile devices, the Internet, and any other digital medium.

GC advertising is coordinated centrally by the Privy Council Office (PCO) and Public Services and Procurement Canada (PSPC). Departments implement advertising initiatives in collaboration with these organizations.

GC advertising allocations are approved annually. MPCSD will advise the Contractor when funding confirmation is received. The Contractor cannot initiate any advertising deliverables until then.

The GC uses the services of a single Agency of Record (AOR), Cossette Communications Inc., to plan and purchase media for government advertising. The Contractor must review the AOR manual, provided by the Project Authority, which outline the GC's media planning and buying procedures, including ad serving and trafficking information. It is the responsibility of the Contractor to refer to the AOR manual.

All Government of Canada advertising campaigns with budgets over \$500,000 must be reviewed to ensure that creative materials are non-partisan. [Advertising Standards Canada](#) (ASC), the independent organization that administers the [Canadian Code of Advertising Standards](#), conducts the reviews on behalf of the Government of Canada. Campaigns with smaller budgets may also be voluntarily submitted for review.

The Contractor must not place any GC advertisement in any advertising medium. The Contractor will be responsible for some media trafficking in collaboration with the AOR. However, materials must not be forwarded to media outlets prior to receiving the Project Authority's written approval, the AOR's email acknowledgement of receipt of the media buying request and the list of media outlets purchased, as applicable.

Upon request from the Project Authority, the Contractor will be required to participate in meetings with the AOR to discuss campaign requirements, procedures, and roles and responsibilities to ensure integrated and seamless campaign planning and execution.

The Contractor should refer to the [Mandatory Procedures for Advertising](#) to fully understand GC advertising requirements.

## 8.2 Policies, Acts and Standards

To ensure the integrity and efficacy of GC advertising, the Contractor must provide services and produce materials in compliance with the administrative policies of the GC issued by the Treasury Board (TBS), including, but not exclusive to, the following:

- The *Policy on Communications and Federal Identity* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683>) to ensure the objectivity and credibility of all Government of Canada communications;
- The *Contracting Policy* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=14494>) to ensure the quality and value of the work they contract out;
- The *Official Languages Act* (PART IV - Communications with and Services to the Public and PART VII - Advancement of English and French) (<https://laws->

- [lois.justice.gc.ca/eng/acts/o-3.01/](https://lois.justice.gc.ca/eng/acts/o-3.01/) ) to ensure the respect, equality of English and French in all advertising and to enhance the vitality of official language minority communities;
- The *Privacy Act* (<https://laws-lois.justice.gc.ca/ENG/ACTS/P-21/index.html>) to ensure proper privacy practices are incorporated and respected in the handling of personal information; and
  - The *Standard on Web Accessibility* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601>), the *Standard on Web Usability* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=24227>) and the *Standard on Web Interoperability* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875>) to ensure conformance with *Web Content Accessibility Guidelines* (WCAG) 2.0 (<https://www.w3.org/TR/WCAG20/>).

The Contractor will also ensure compliance with the relevant legislation of all Canadian jurisdictions where the advertising and collateral materials will be used.

Rules that guide our communications activities can be found at <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications.html>

The Contractor must maintain financial records in support of HC's responsibilities under the Financial Administration Act and provide information in support of HC's responsibilities under the Access to Information Act. As well, the Contractor will ensure compliance with the relevant legislation of all Canadian jurisdictions where the campaign materials will be used.

### 8.3 Approvals Process

The Project Authority (PA) will be a representative from HC's Marketing, Partnerships and Creative Services Division (MPCSD). The PA identified within the contract will be responsible for providing the Contractor with the AOR manual, seeking all necessary approvals, providing written approvals of all work, receiving all final deliverable material, and verifying that value for money has been obtained.

The Contractor will work with the PA to set a timeline for delivery and presentation of work including campaign briefs, campaign strategies, creative concepts, and post-campaign reports.

The Project Authority will work with the Contractor to define and refine the message and the development and design of materials to be applied to the campaign prior to getting approval from internal Program colleagues and senior management. MPCSD will apply an approval process to messaging, draft and final versions of all deliverables, including ads. Final approval cannot be obtained until the Director of MPCSD signs off by email. Once this occurs, the Project Authority will communicate approval to the Contractor. It is the Project Authority's responsibility to seek approvals from GC central organizations as well as from relevant groups, both internal and external to HC, and senior management within HC. The Contractor may be asked to provide presentation materials and / or to make presentations for this purpose.

Development of advertising and related materials requires significant internal communications and approvals.



HC Strategic Communications, specific Program authorities as well as Deputy Ministers', Minister's Offices and the Privy Council Office (PCO) may be involved throughout this process. In addition, there are significant stakeholder groups that will be informed of the approach being taken. These additional levels of approval may result in longer timeframes for approval prior to proceeding with specific projects. The Contractor should build in a minimum two-week period for client approvals on each major milestone/deliverable in the campaign development process, and longer depending on the sensitivity of the project.

### **Reporting Requirements**

The Contractor will prepare weekly project status reports and provide details of the work done during the previous month. Monthly budget reports outlining the overall budget and how each project is tracking against it will be required.

At the minimum the work may include:

- Weekly project status updates to be provided via email or phone, to be determined at the onset of the project
- Cost reports on a monthly basis, including breakdown by personnel, resources, travel and rates; the agency will track time separately for separate components of the campaign when presenting monthly costing reports
- The Contractor and project authority will develop a process for documenting activities and direct costs. In particular, it must furnish the level of effort (time and resources) it expended to provide the services required by the department
- Financial reporting on a bi-weekly basis, including short-term estimations on upcoming work, and cost overviews of previous work done during the two week period
- Face-to-face meetings will occur as needed, with contact reports provided to MPCSD after the conclusion of the meeting via email

### **Project Management Control Procedures**

MPCSD will assign a dedicated Project Manager to the campaign, and will:

- Provide access to the Project Authority or the dedicated Project Manager, who will be responsible for coordinating the overall project, providing as-required direction and guidance to the Contractor, and accepting and approving the Contractor deliverables on behalf of HC
- Screen and review material and work with the Contractor to revise and enhance the material according to the agreed upon processes and timelines
- Monitor progress, give required direction and provide timely feedback
- Obtain approvals from HC management, internal clients and the GC central agencies - PCO, PSPC and Treasury Board Secretariat (TBS), as required
- Provide access to relevant materials (if needed):
  - Research results
  - Web and print products as applicable
  - Existing content, in both official languages
  - Other background material as deemed relevant by the Project Authority

#### 8.4 Creative Content Constraints

The Contractor will ensure creatives reflect the diversity of Canada's population (women, men and non-binary people, and other identity factors such as race, ethnicity, religion, age, and mental or physical disability). Advertising creative may be subject to a departmental GBA+ review (an analytical process used to assess how diverse groups of people may experience policies, programs and initiatives).

Specifically, deliverables must be:

- Credible, relevant and motivational
- Effective in both English and French
- Representative of the diversity of Canada's population
- Optimized for the placement platform, and alternate platforms (ex. mobile and desktop)
- Identify the website and/or applicable contact information.
- Comply with the *GC Policy on Communications and Federal Identity*, the *Directive on the Management of Communications* and the *Federal Identity Program Manual*. The requirements include:

- Using only versions of the official symbols that are based on the digital master files maintained by the Federal Identity Program ;
- Including the Canada wordmark in association with the appropriate corporate signature in all fields of application;
- Displaying the official symbols prominently, free from other visual elements and visually conflicting backgrounds; and,
- Appropriately identifying partners.

#### Internet Display:

Web Requirements for Creatives Placed on Government of Canada Digital Networks can be accessed at: <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications/social-media-web-requirements.html>

The GC has recently transitioned to a new mandate for the Agency of Record, therefore, Web Requirements for Creatives Placed on Non-Government of Canada Digital Properties are currently being defined and the final version will be shared after the contract is awarded. Please refer to Appendix B for draft Web Requirements for Creatives Placed on Non-Government of Canada Digital Properties.

#### Web Videos:

Please refer to Appendix C for current Web Video Requirements for Deliverables

#### Social Media:

Social media design and development guidelines for posts change regularly. The following provides the most up to date guidance: <https://help.hootsuite.com/hc/en-us/articles/115010088387#4>. Additional guidance on publishing to HC, PHAC and Healthy Canadians channels will be made available by the PA.

Other creative constraints may arise throughout the development of the campaign. To obtain further information on these mandatory requirements, contact the Project Authority.

Additional relevant GC standards can be found at <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications.html>

### 8.5 Green Procurement

All projects should be delivered in an environmentally responsible manner, to the fullest extent possible. Clients and suppliers will be encouraged to transmit work requests electronically.

- All non-electronic correspondence and deliverables should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content and processed chlorine free, whenever possible.
- Double-sided photocopying will be the default unless otherwise (i.e. creative samples) specified by the Project Authority.
- Photocopied documents are to be in black and white format, unless otherwise specified.
- The Contractor will be encouraged to provide proofs for client review and approval on-screen or by e-mail, electronic file transfer service, CD, DVD or zip file\*, wherever possible.

### 8.6 Technological Constraints

Some software, websites, file transfer protocol (FTP) and file transfer services are inaccessible to HC and the staff. The Contractor is required to find appropriate solutions for staff to review and share draft working and final materials.

At a minimum, and unless specified otherwise, the Contractor should be proficient with Adobe (including Adobe Illustrator, Adobe Photoshop, Adobe PremierePro, Adobe FireWorks, and Adobe Flash) for the various advertising and marketing products that it is required to produce. As well, the Contractor must be able to provide all required deliverables in electronic format compliant with HC's software suite:

- PC-based for day-to-day operations: Microsoft Office Suite 2016, Adobe Reader v10 (or higher), Microsoft Outlook, Windows Media Player v12 (or higher), Internet Explorer v11
- Mac Base for graphic design services: Adobe Creative Cloud
- Web: Adobe Dreamweaver, FTP client, web browsers, Adobe Photoshop

In addition, the Contractor must have the ability to upgrade/change their software in response to HC's changes to their standard software throughout the period of the contract.

## 9. SERVICES REQUIRED

MPCSD has determined the following service categories to be requisite for the provision of Marketing and Advertising Services in relation to this requirement:

### 9.1 Account Management and Coordination Services

The Contractor is required to provide account services that may include, but are not limited to:

- Ensure that all procedures have been followed and that the contract, and any amendments, are received from the Communication Procurement Directorate (CPD) of PSPC prior to the commencement of work;
- Oversee the life of the project to ensure the quality of work and the adherence to timelines, budgets, and staff resources;
- Attend client briefings and meetings; provide status reports detailing budgets and timelines; produce estimates for approval; advise of budget variances; and facilitate the production process;
- Work closely with the AOR to ensure integrated campaigns and seamless execution.
- Ensure that all creative elements have the Project Authority's signed approval prior to production;
- Provide cost reports on a monthly basis including breakdown by personnel, resources, travel and rates; and
- Deliver all requested components as detailed in this Statement of Work (SOW) and subsequent Task Authorization (TA) documents.
- Manage and balance urgent and competing requests that may arise with little notice.

## 9.2 Strategic Services

### 9.2.1 Strategic Planning and Development Services

For each topic or area of focus identified, the Contractor may be required to produce an overarching campaign strategy (in line with the Cabinet and Treasury Board approved advertising plan if applicable) that explains how the creative approach will achieve the campaign objectives. Services should include, but are not limited to:

- Offer strategic insight and advice for the development of media briefs for AOR Media Planning Services
- Develop creative strategies and work closely and collaboratively with the AOR's Media Planning Services to ensure integrated creative and media strategies/plans
- Adapt, update and/or build on any existing creative strategy for advertising services, as proposed by a previous advertising Contractor or MPCSD (as required)
- Provide secondary research and analysis data (if necessary), and review past campaign performance (e.g., ACET, Google Analytics reports, AOR reports, survey results) and HC-supplied research, on which to base the overall strategic advertising direction and strategy. The initial plan will provide the PA as well as the Contractor with strategic advice on best approaches to reach the objectives. The Contractor may be expected to provide a plan with the following areas, if necessary:
  - Marketing/Advertising objectives
  - Target audience
  - Key Messages
  - Creative Strategy and Creative compositions
  - Measurable objectives
  - Budget

- Timelines
- Deliverables
- Indicated action and next steps
- Evaluation process
- Offer a description of the creative idea, the central message(s), and a rationale of why the idea will resonate with the audience(s), including a summary of the insights that support the strategic recommendation(s).

### 9.2.2 Web and Interactive Strategic Services

#### Roles and Responsibilities:

- In some cases, for example where a non-Canada.ca web presence is recommended (such as a microsite), the Contractor may be required to provide a creative web strategy, as part of the overall campaign plan.
- The Contractor will ensure the plan includes, at a minimum, the following:
  - The proposed approach involved in meeting the campaign objectives and reaching campaign target audiences (must be measurable)
  - Compliance with Government of Canada Web standards (including accessibility)
  - Timelines (including time to source technical expertise to build and maintain the proposed assets and the proposed lifecycle of the digital asset)
  - Budget
  - Creative web and interactive strategy and creative mock ups (including production that would be required, or the identification of existing creative assets that can be re-used)
  - Deliverables
  - Proposed responsibilities for monitoring comments/interaction
  - Indicated action and next steps
  - Strong evaluation (including benchmarks against industry and other standards)
  - Signed authorization by the Project Authority prior to implementation
  - Actionability with validated support and ideas that are aligned with the marketing strategy

### 9.3 Creative and Production Services

Generally per campaign, the Contractor is required to present three distinct colour design concepts (or more as identified by the Project Authority/Senior Management), adapted for the various tactics in the strategy, for review and approval by the Project Authority.

For all creative, as applicable to each campaign and medium, the Contractor is required to:

- Oversee, provide direction, ensure quality control and produce (and/or adapt existing) all creative elements, concepts, development, and production of all advertising products as well as any marketing/collateral/partnership materials developed in support of the advertising products and marketing campaign-related products which may include, but are not limited to:

- Print production
  - Ads in newspapers, magazines/journals, out-of-home (transit, billboards, etc)
  - Direct mail piece
  - Collateral such as brochures, pamphlets, posters
  - Signs and banners (including for mall and transit placement)
- Broadcast production
  - TV, radio, cinema and other audiovisual
- Electronic production
  - Web design and graphics, interactive features, banners and buttons
  - Social media visuals
  - Podcasts
  - Infographics
  - Search engine marketing
  - Online video
  - Mobile
  - Other digital media, if applicable
- Others as required
  - Illustrations and images
  - Motion graphics
  - Animation
  - Custom photography
- Produce creative concepts in the form of mock-ups, story boards, treatments, or scripts;
- Provide creative material for focus testing in both official languages, and other languages, if required;
- Revise and finalize the creative concept based on focus testing results and/ or Project Authority's recommendations; as well as changes that can arise throughout the approval process;
- Write and edit text, including copy, for all drafts through to final materials;
- Provide copy-editing and proofreading services;
- Translate/adapt to the other official language and non-official language(s) all text for drafts through to final materials;
- Manage the regional adaptation of national campaign components;
- Produce graphics, photographs and design layouts through to pre-press for all printed materials;
- Script, shoot, and post-produce through to final edit for broadcast, video, and cinema materials;
- Design, program and test through to final release for new media and Internet materials;
- Print, resize or duplicate copies (including quality assurance) for distribution to media outlets;
- Acquire all copyrights (for pictures and artwork) and negotiate talent fees following appropriate Canadian unions (e.g. Alliance of Canadian Cinema, Television and Radio Artists (ACTRA), Union des Artistes (UDA));
- Distribute (traffic) materials to media outlets for non-digital creative and to the AOR for digital creative (materials must not be forwarded to media outlets prior to receiving the AOR's email acknowledgement of receipt of the media buying request and the list of media outlets purchased, as applicable);

- Deliver a CD, DVD, encrypted flash drive, and/or electronic transfer of the master copy of final "ready-to-use" artwork/materials (including all working files e.g., layered or native files, text files, graphics, images, etc.) to the Project Authority; and
- Manage and ensure quality control of sub-Contractor' work.
- Coordinate creative direction and production to address media recommendations made by the AOR as part of its services
- Manage and balance urgent and competing requests that may arise with little notice and short turnaround time.

All "studio" services including items such as file retrieval, burning CDs, upload to extranet, mounting and mock-ups, etc. to support the development of advertising and marketing materials are to be included within the production services category as identified above.

## 10. ADMINISTRATIVE SUPPORT SERVICES

The Contractor is required to provide administrative support services including:

- Project invoices, in accordance with the invoicing instructions, and each task authorization
- Provide reports by e-mail to Project Authority detailing the time and resources used to provide the services requested through a task authorization
- Provide estimates as requested by the Project Authority and as per each task authorization
- Provide for a process to ensure that at the end of a contract, all deliverables are delivered to the Crown (within 30 days of the expiry of the contract or within timelines set-out by the Project Authority in a task authorization) and in final workable formats. This process, to occur in the final year of the contract, must be developed and approved in consultation with the PA.

These services are part of the overall services to be provided by the Contractor and as such, the Project Authority will not be charged separately for the production or supply of these services. Since these costs are considered overhead, the Contractor is required to integrate them into the hourly rates in the basis of payment when producing their bid.

## 11. DELIVERABLES

The Contractor must provide the services outlined in Section 9 of this Statement of Work for the initial contract period and up to three (3) one (1) year option periods.

## 12. ASSISTANCE SUPPLIED BY DEPARTMENT

For each topic or area of focus identified, the Project Authority will be responsible for the following activities:

- Providing a creative brief to the agency
- Providing existing creative and evaluations of relevant past campaigns
- Providing a Project Manager (Marketing Advisor) dedicated to agency liaison
- Providing relevant Public Opinion Research
- Providing background information for content of fulfillment pieces (graphical elements, campaign tag line and Web address to be added by the Contractor)
- Obtaining and providing approvals from HC management and the GC agencies as required

A Marketing Advisor from the MPCSD will be dedicated to being the liaison with the Contractor and will be available to the Contractor Monday to Friday to provide relevant research (working with POR and internal Program contacts), marketing plans and any other necessary documents required by the Contractor.

### **13. MEETINGS**

For each campaign, the Contractor is expected to participate in an initial briefing with the AOR, by phone or in person (to be identified by the PA), to discuss the Campaign Brief document, as well as participate in meetings (schedule to be identified by the PA) to ensure campaign integration between the creative and media strategies.

The Contractor may be asked to participate in meetings with HC in Ottawa in person and as requested, by phone with various audiences. Many of the meetings will involve examination, assessment and refinement of marketing materials that can only be accomplished by in-person collaboration.

### **14. TRAVEL**

HC will pay reasonable travel expenses for the Contractor's representative(s) in accordance with the Treasury Board Travel Guidelines (available at the following web site: [www.tbs-sct.gc.ca/psm-fpfm/pay-remuneration/travel-deplacements/menu-travel-voyage-eng.asp](http://www.tbs-sct.gc.ca/psm-fpfm/pay-remuneration/travel-deplacements/menu-travel-voyage-eng.asp)) at the time of travel to attend in person these meetings and when requested for marketing discussions that necessitate in person collaboration. Where travel is deemed necessary, the Contractor will submit a cost estimate to the Project Authority for authorization prior to traveling.

Payment for travel and living expenses must be made in accordance to the terms of payment and the *National Joint Council Travel Directive*.



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## ANNEX "A2" - STATEMENT OF WORK – PUBLIC HEALTH AGENCY OF CANADA

### 1. INTRODUCTION

Health Canada's Marketing, Partnerships and Creative Services Division (MPCSD) is seeking a lead marketing and advertising creative agency to provide a full range of creative development and advertising-related services for various **Public Health Agency of Canada (PHAC)** marketing campaigns. Services could include:

- Providing overall strategic campaign direction
- Developing creative strategy and managing production (including trafficking of files to media when required)
- Collaborating with Agency of Record on elaboration of respective creative and media strategies to ensure alignment and integration between media and creative
- Offering strategic oversight and advice, including on-going and wrap up evaluation, as required

### 2. BACKGROUND

Public Health Agency of Canada is the federal department responsible for public health issues in Canada. PHAC has a leadership role in coordinating the response to national public health preparedness and prevention events that occur in more than one province or territory. This leadership role includes the provision and coordination of national health-related communications and marketing activities.

Health Canada's *Marketing, Partnerships and Creative Services Division* (MPCSD) provides communications-related services to Health Canada and the Public Health Agency of Canada (PHAC). From year to year, MPCSD manages a number of small to large-scale marketing campaigns on various topics and reaches out to diverse target audiences that make up the Canadian public (segmented in a variety of manners), healthcare professionals and various stakeholders. Topics and areas of focus vary dependent on PHAC and Government of Canada (GC) priorities. Relevant topics may also emerge as the years develop.

PHAC campaign topics may include:

- Infectious diseases (including blood, organ and tissue donation and disease prevention)
- Chronic diseases (including risk factors and management)
- Travel Health Canada - Santé Canada
- Immunization and vaccines
- Biosafety and security
- Emergency preparedness and response
- Injury prevention
- Public Health Agency of Canada regulations and/or consultations

MPCSD wishes to establish contracts with a Lead Agency (Contractor) that allows for the appropriate campaign planning, creative development and execution of key marketing activities that support PHAC's mandate. A separate contract (see Statement of Work –Health Canada) will be issued for work supporting HC's mandate.

It is expected that the Contractor will develop immediate, short-term and long-term tactics to support PHAC activities and align initiatives nationally as the need arises. The Contractor must be able to provide

a full range of marketing activity planning, development and implementation that can include, but is not limited to:

- Advertising creative strategy, production and trafficking (including television, digital video, mobile, social media, print, radio, out of home and others)
  - The Contractor must provide information and materials to other contractors of the GC, if requested, to test creative concepts as well as evaluate audience impact using PHAC pre-and-post-campaign surveys.
- Strategic marketing advice and development of non-advertising tactics, including:
  - digital, animated, mobile, social media, infographics, podcasts (including other new technologies)
  - print products such as posters, brochures, etc.
  - partnership building with trusted intermediaries (including professional associations and direct to industry communication) and production of supporting resources.

While most initiatives are planned in advance, MPCSD requires a Contractor that can also deal with pressing, urgent or emergency-driven marketing that may arise. In the event of a public health emergency or crisis, public communications, including marketing and advertising, will be essential to supporting and enhancing the response efforts of PHAC.

Creative development and advertising-related services for campaigns with smaller budgets is generally undertaken by MPCSD and in-house support services. This contract is being set up for outsourcing of projects requiring more complex or significant production support (e.g. mid-to-large scale campaigns) for which a full-service advertising creative agency may be best suited to address, and to assist with surge capacity when required.

*This contract does not include:*

- Media strategy development, media planning and buying, event-based marketing or experiential events and influencer marketing. The tactics may be recommended as a part of the overall marketing strategy, but the planning and implementation of these tactics would be a separate contract.
- Campaigns on controlled substances or illicit drugs: MPCSD, or HC on behalf of PHAC, reserves the right to issue a separate contract for campaigns related to controlled substances as the need arises. A controlled substance is any type of drug that the federal government has categorized as having a higher-than-average potential for abuse or addiction and range from illegal street drugs to prescription medications.

### **3. OBJECTIVES AND PURPOSE**

The overarching objective and common goal of PHAC's marketing activities are to provide Canadians with targeted, timely, relevant, comprehensive and accessible information to assist them in making informed decisions to protect their health.

Tools and tactics achieve the following communications goals:

- Increase awareness and knowledge among Canadians, particularly key target audiences and vulnerable populations, about health risks and how they can protect their immediate and long-term health for themselves and their families.
- Influence health attitudes and behaviours among the target audiences.
- Demonstrate leadership and build PHAC's credibility as a trusted source of health information.
- Increase knowledge of the Department's policies and priorities, as well as programs.

Campaigns often include multiple target audiences (with complementary messages and tactics). Campaigns targeted to health professionals and other stakeholders (e.g. industry) have similar overarching goals of awareness, knowledge and uptake.

### **Expected Results**

These marketing activities are expected to increase dissemination and uptake of PHAC's information and resources by Canadians (including health professionals) and health organizations .

### **4. KEY CAMPAIGN MESSAGES**

Tailored messages for each PHAC priority files will be developed as part of any task authorization established within this contract

Given the responsibilities of other governmental departments concerning health topics, it will be essential to work closely with federal partners to ensure messages are clear, consistent and complementary.

### **5. TARGET AUDIENCES**

Target audiences will be determined with each marketing activity and may include multiple target audiences such as: children, youth, teens, young adults, adults, seniors, parents (of babies, children, teens or young adults), people with a compromised immune system, pregnant women, students, renters, homeowners, Indigenous peoples, new Canadians, stakeholders and/or health intermediaries.

### **6. ENVIRONMENTAL CONSIDERATIONS**

Environmental considerations will be determined with each marketing activity. Overall research indicates:

- Canadians prefer a streamlined way to get consistent, reliable information regarding health and safety issues and it is important with a digital first approach to communications to ensure we meet Canadians where they are online
- Canadians already know basic information on a multitude of topics related to health and safety, but their knowledge levels of these topics vary.
- Information must be made available to Canadians in a way that is user friendly and useful to them. Visitors to the website should be able to search for information that is relevant to their needs, and have the flexibility to receive that information in a way that suits them. Social media efforts should be focused on targeting key audiences where they are online, providing them with shareable content and identifying other social media influencers that should also be reached to expand reach and impact of messages.
- Tailoring of campaign messages to reach specific target audiences may require a wide variety of platforms and methods (i.e. not one-size-fits-all).

- Adaptation/transcreation of resources for the other official language is to take place at the creative strategy and concept stage to ensure the subject matter, tone, environmental factors, and cultural references resonate with the target audience.

## 7. CAMPAIGN EVALUATION

The campaign evaluation will be conducted by MPCSD.

The creative agency will only be expected to provide evaluation analytics and insights on tactics developed and implemented as part of the campaign. Metrics supplied could include public opinion research, focus testing, advertising results, web and social media analytics.

Note: As per the Mandatory Procedures for Advertising of the Government of Canada, for any campaigns above \$1M (excluding fees and taxes) in media buy, institutions must pre-test their advertising campaigns as well as conduct a post-campaign evaluation using the Advertising Campaign Evaluation Tool (ACET). Public opinion research does not form part of this requirement and will be contracted separately by the Government of Canada if needed.

## 8. WORK and CONTRACT CONSTRAINTS

Suppliers should be aware of the following constraints that will affect how the work must be done:

### 8.1 Government of Canada Advertising

Government of Canada advertising is defined as any message conveyed in Canada or abroad and paid for by the government for placement in media, including but not limited to newspapers, television, radio, cinema, billboards and other out-of-home media, mobile devices, the Internet, and any other digital medium.

GC advertising is coordinated centrally by the Privy Council Office (PCO) and Public Services and Procurement Canada (PSPC). Departments implement advertising initiatives in collaboration with these organizations.

GC advertising allocations are approved annually. MPCSD will advise the Contractor when funding confirmation is received. The Contractor cannot initiate any advertising deliverables until then.

The GC uses the services of a single Agency of Record (AOR), Cossette Communications Inc., to plan and purchase media for government advertising. The Contractor must review the AOR manual, provided by the Project Authority, which outline the GC's media planning and buying procedures, including ad serving and trafficking information. It is the responsibility of the Contractor to refer to the AOR manual.

All Government of Canada advertising campaigns with budgets over \$500,000 must be reviewed to ensure that creative materials are non-partisan. [Advertising Standards Canada](#) (ASC), the independent organization that administers the [Canadian Code of Advertising Standards](#), conducts the reviews on behalf of the Government of Canada. Campaigns with smaller budgets may also be voluntarily submitted for review.

The Contractor must not place any GC advertisement in any advertising medium. The Contractor will be responsible for some media trafficking in collaboration with the AOR. However, materials must not be forwarded to media outlets prior to receiving the Project Authority's written approval, the AOR's email acknowledgement of receipt of the media buying request and the list of media outlets purchased, as applicable.

Upon request from the Project Authority, the Contractor will be required to participate in meetings with the AOR to discuss campaign requirements, procedures, and roles and responsibilities to ensure integrated and seamless campaign planning and execution.

The Contractor should refer to the [Mandatory Procedures for Advertising](#) to fully understand GC advertising requirements.

## 8.2 Policies, Acts and Standards

To ensure the integrity and efficacy of GC advertising, the Contractor must provide services and produce materials in compliance with the administrative policies of the GC issued by the Treasury Board (TBS), including, but not exclusive to, the following:

- The *Policy on Communications and Federal Identity* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683>) to ensure the objectivity and credibility of all Government of Canada communications;
- The *Contracting Policy* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=14494>) to ensure the quality and value of the work they contract out;
- The *Official Languages Act* (PART IV - Communications with and Services to the Public and PART VII - Advancement of English and French) (<https://laws-lois.justice.gc.ca/eng/acts/o-3.01/>) to ensure the respect, equality of English and French in all advertising and to enhance the vitality of official language minority communities;
- The *Privacy Act* (<https://laws-lois.justice.gc.ca/ENG/ACTS/P-21/index.html>) to ensure proper privacy practices are incorporated and respected in the handling of personal information; and
- The *Standard on Web Accessibility* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601>), the *Standard on Web Usability* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=24227>) and the *Standard on Web Interoperability* (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25875>) to ensure conformance with *Web Content Accessibility Guidelines* (WCAG) 2.0 (<https://www.w3.org/TR/WCAG20/>).

The Contractor will also ensure compliance with the relevant legislation of all Canadian jurisdictions where the advertising and collateral materials will be used.

Rules that guide our communications activities can be found at <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications.html>

The Contractor must maintain financial records in support of HC and PHAC responsibilities under the Financial Administration Act and provide information in support of HC and PHAC's responsibilities under the Access to Information Act. As well, the Contractor will ensure

compliance with the relevant legislation of all Canadian jurisdictions where the campaign materials will be used.

### **8.3 Approvals Process**

The Project Authority (PA) will be a representative from HC's Marketing, Partnerships and Creative Services Division (MPCSD). The PA identified within the contract will be responsible for providing the Contractor with the AOR manual, seeking all necessary approvals, providing written approvals of all work, receiving all final deliverable material, and verifying that value for money has been obtained.

The Contractor will work with the PA to set a timeline for delivery and presentation of work including campaign briefs, campaign strategies, creative concepts, and post-campaign reports.

The Project Authority will work with the Contractor to define and refine the message and the development and design of materials to be applied to the campaign prior to getting approval from internal Program colleagues and senior management. MPCSD will apply an approval process to messaging, draft and final versions of all deliverables, including ads. Final approval cannot be obtained until the Director of MPCSD signs off by email. Once this occurs, the Project Authority will communicate approval to the Contractor. It is the Project Authority's responsibility to seek approvals from GC central organizations as well as from relevant groups, both internal and external to HC and PHAC, and senior management within HC and PHAC. The Contractor may be asked to provide presentation materials and / or to make presentations for this purpose.

Development of advertising and related materials requires significant internal communications and approvals.

PHAC Strategic Communications, specific Program authorities as well as Deputy Ministers', Minister's Offices and the Privy Council Office (PCO) may be involved throughout this process. In addition, there are significant stakeholder groups that will be informed of the approach being taken. These additional levels of approval may result in longer timeframes for approval prior to proceeding with specific projects. The Contractor should build in a minimum two-week period for client approvals on each major milestone/deliverable in the campaign development process, and longer depending on the sensitivity of the project.

### **Reporting Requirements**

The Contractor will prepare weekly project status reports and provide details of the work done during the previous month. Monthly budget reports outlining the overall budget and how each project is tracking against it will be required.

At the minimum the work may include:

- Weekly project status updates to be provided via email or phone, to be determined at the onset of the project
- Cost reports on a monthly basis, including breakdown by personnel, resources, travel and rates; the agency will track time separately for separate components of the campaign when presenting monthly costing reports

- The Contractor and project authority will develop a process for documenting activities and direct costs. In particular, it must furnish the level of effort (time and resources) it expended to provide the services required by the department
- Financial reporting on a bi-weekly basis, including short-term estimations on upcoming work, and cost overviews of previous work done during the two week period
- Face-to-face meetings will occur as needed, with contact reports provided to MPCSD after the conclusion of the meeting via email

### **Project Management Control Procedures**

MPCSD will assign a dedicated Project Manager to the campaign, and will:

- Provide access to the Project Authority or the dedicated Project Manager, who will be responsible for coordinating the overall project, providing as-required direction and guidance to the Contractor, and accepting and approving the Contractor deliverables on behalf of HC
- Screen and review material and work with the Contractor to revise and enhance the material according to the agreed upon processes and timelines
- Monitor progress, give required direction and provide timely feedback
- Obtain approvals from HC and PHAC management, internal clients and the GC central agencies - PCO, PSPC and Treasury Board Secretariat (TBS), as required
- Provide access to relevant materials (if needed):
  - Research results
  - Web and print products as applicable
  - Existing content, in both official languages
  - Other background material as deemed relevant by the Project Authority

### **8.4 Creative Content Constraints**

The Contractor will ensure creatives reflect the diversity of Canada's population (women, men and non-binary people, and other identity factors such as race, ethnicity, religion, age, and mental or physical disability). Advertising creative may be subject to a departmental GBA+ review (an analytical process used to assess how diverse groups of people may experience policies, programs and initiatives).

Specifically, deliverables must be:

- Credible, relevant and motivational
- Effective in both English and French
- Representative of the diversity of Canada's population
- Optimized for the placement platform, and alternate platforms (ex. mobile and desktop)
- Identify the website and/or applicable contact information.
- Comply with the *GC Policy on Communications and Federal Identity*, the *Directive on the Management of Communications* and the *Federal Identity Program Manual*. The requirements include:
  - Using only versions of the official symbols that are based on the digital master files maintained by the Federal Identity Program ;
  - Including the Canada wordmark in association with the appropriate corporate signature in all fields of application;



- Displaying the official symbols prominently, free from other visual elements and visually conflicting backgrounds; and,
- Appropriately identifying partners.

**Internet Display:**

Please refer to Appendix B for current Web Requirements for Creatives Placed on Government of Canada Digital Networks

The GC has recently transitioned to a new mandate for the Agency of Record, therefore, Web Requirements for Creatives Placed on Non-Government of Canada Digital Properties are currently being defined and the final version will be shared after the contract is awarded. Please refer to Appendix C for draft Web Requirements for Creatives Placed on Non-Government of Canada Digital Properties

**Web Videos:**

Please refer to Appendix D for current Web Video Requirements for Deliverables

Internet development must comply with Web Standards for the GC.

Other creative constraints may arise throughout the development of the campaign. To obtain further information on these mandatory requirements, contact the Project Authority.

**Social Media:**

Please refer to Appendix E for Healthy Canadians Social Media Design and Development Guidelines

All the relevant standards can be found at <https://www.canada.ca/en/treasury-board-secretariat/topics/government-communications.html>

**8.5 Green Procurement**

All projects should be delivered in an environmentally responsible manner, to the fullest extent possible. Clients and suppliers will be encouraged to transmit work requests electronically.

- All non-electronic correspondence and deliverables should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content and processed chlorine free, whenever possible.
- Double-sided photocopying will be the default unless otherwise (i.e. creative samples) specified by the Project Authority.
- Photocopied documents are to be in black and white format, unless otherwise specified.
- The Contractor will be encouraged to provide proofs for client review and approval on-screen or by e-mail, electronic file transfer service, CD, DVD or zip file\*, wherever possible.



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## 8.6 Technological Constraints

Some software, websites, file transfer protocol (FTP) and file transfer services are inaccessible to HC, PHAC and the staff. The Contractor is required to find appropriate solutions for staff to review and share draft working and final materials.

At a minimum, and unless specified otherwise, the Contractor should be proficient with Adobe (including Adobe Illustrator, Adobe Photoshop, Adobe PremierePro, Adobe FireWorks, and Adobe Flash) for the various advertising and marketing products that it is required to produce. As well, the Contractor must be able to provide all required deliverables in electronic format compliant with HC and PHAC software suites:

- PC-based for day-to-day operations: Microsoft Office Suite 2016, Adobe Reader v10 (or higher), Microsoft Outlook, Windows Media Player v12 (or higher), Internet Explorer v11
- Mac Base for graphic design services: Adobe Creative Cloud
- Web: Adobe Dreamweaver, FTP client, web browsers, Adobe Photoshop

In addition, the Contractor must have the ability to upgrade/change their software in response to HC and PHAC changes to their standard software throughout the period of the contract.

## 9. SERVICES REQUIRED

MPCSD has determined the following service categories to be requisite for the provision of Marketing and Advertising Services in relation to this requirement:

### 9.1 Account Management and Coordination Services

The Contractor is required to provide account services that may include, but are not limited to:

- Ensure that all procedures have been followed and that the contract, and any amendments, are received from the Communication Procurement Directorate (CPD) of PSPC prior to the commencement of work;
- Oversee the life of the project to ensure the quality of work and the adherence to timelines, budgets, and staff resources;
- Attend client briefings and meetings; provide status reports detailing budgets and timelines; produce estimates for approval; advise of budget variances; and facilitate the production process;
- Work closely with the AOR to ensure integrated campaigns and seamless execution.
- Ensure that all creative elements have the Project Authority's signed approval prior to production;
- Provide cost reports on a monthly basis including breakdown by personnel, resources, travel and rates; and
- Deliver all requested components as detailed in this Statement of Work (SOW) and subsequent Task Authorization (TA) documents.
- Manage and balance urgent and competing requests that may arise with little notice.

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## 9.2 Strategic Services

### 9.2.1 Strategic Planning and Development Services

For each topic or area of focus identified, the Contractor may be required to produce an overarching campaign strategy (in line with the Cabinet and Treasury Board approved advertising plan if applicable) that explains how the creative approach will achieve the campaign objectives. Services should include, but are not limited to:

- Offer strategic insight and advice for the development of media briefs for AOR Media Planning Services
- Develop creative strategies and work closely and collaboratively with the AOR's Media Planning Services to ensure integrated creative and media strategies/plans
- Adapt, update and/or build on any existing creative strategy for advertising services, as proposed by a previous advertising Contractor or HC's Marketing Division (as required)
- Provide secondary research and analysis data (if necessary), and review past campaign performance (e.g., ACET, Google Analytics reports, AOR reports, survey results) and HC-supplied research, on which to base the overall strategic advertising direction and strategy. The initial plan will provide the PA as well as the Contractor with strategic advice on best approaches to reach the objectives. The Contractor may be expected to provide a plan with the following areas, if necessary:
  - Marketing/Advertising objectives
  - Target audience
  - Key Messages
  - Creative Strategy and Creative compositions
  - Measurable objectives
  - Budget
  - Timelines
  - Deliverables
  - Indicated action and next steps
  - Evaluation process
- Offer a description of the creative idea, the central message(s), and a rationale of why the idea will resonate with the audience(s), including a summary of the insights that support the strategic recommendation(s).

### 9.2.2 Web and Interactive Strategic Services

Roles and Responsibilities:

- In some cases, for example where a non-Canada.ca web presence is recommended (such as a microsite), the Contractor may be required to provide a creative web strategy, as part of the overall campaign plan.
- The Contractor will ensure the plan includes, at a minimum, the following:
  - The proposed approach involved in meeting the campaign objectives and reaching campaign target audiences (must be measurable)
  - Compliance with Government of Canada Web standards (including accessibility)

- Timelines (including time to source technical expertise to build and maintain the proposed assets and the proposed lifecycle of the digital asset)
- Budget
- Creative web and interactive strategy and creative mock ups (including production that would be required, or the identification of existing creative assets that can be re-used)
- Deliverables
- Proposed responsibilities for monitoring comments/interaction
- Indicated action and next steps
- Strong evaluation (including benchmarks against industry and other standards)
- Signed authorization by the Project Authority prior to implementation
- Actionability with validated support and ideas that are aligned with the marketing strategy

### 9.3 Creative and Production Services

Generally per campaign, the Contractor is required to present three distinct colour design concepts (or more as identified by the Project Authority/Senior Management), adapted for the various tactics in the strategy, for review and approval by the Project Authority.

For all creative, as applicable to each campaign and medium, the Contractor is required to:

- Oversee, provide direction, ensure quality control and produce (and/or adapt existing) all creative elements, concepts, development, and production of all advertising products as well as any marketing/collateral/partnership materials developed in support of the advertising products and marketing campaign-related products which may include, but are not limited to:
  - Print production
    - Ads in newspapers, magazines/journals, out-of-home (transit, billboards, etc)
    - Direct mail piece
    - Collateral such as brochures, pamphlets, posters
    - Signs and banners (including for mall and transit placement)
  - Broadcast production
    - TV, radio, cinema and other audiovisual
  - Electronic production
    - Web design and graphics, interactive features, banners and buttons
    - Social media visuals
    - Podcasts
    - Infographics
    - Search engine marketing
    - Online video
    - Mobile
    - Other digital media, if applicable
  - Others as required
    - Illustrations and images
    - Motion graphics

- Animation
  - Custom photography
- Produce creative concepts in the form of mock-ups, story boards, treatments, or scripts;
- Provide creative material for focus testing in both official languages, and other languages, if required;
- Revise and finalize the creative concept based on focus testing results and/ or Project Authority's recommendations; as well as changes that can arise throughout the approval process;
- Write and edit text, including copy, for all drafts through to final materials;
- Provide copy-editing and proofreading services;
- Translate/adapt to the other official language and non-official language(s) all text for drafts through to final materials;
- Manage the regional adaptation of national campaign components;
- Produce graphics, photographs and design layouts through to pre-press for all printed materials;
- Script, shoot, and post-produce through to final edit for broadcast, video, and cinema materials;
- Design, program and test through to final release for new media and Internet materials;
- Print, resize or duplicate copies (including quality assurance) for distribution to media outlets;
- Acquire all copyrights (for pictures and artwork) and negotiate talent fees following appropriate Canadian unions (e.g. Alliance of Canadian Cinema, Television and Radio Artists (ACTRA), Union des Artistes (UDA));
- Distribute (traffic) materials to media outlets for non-digital creative and to the AOR for digital creative (materials must not be forwarded to media outlets prior to receiving the AOR's email acknowledgement of receipt of the media buying request and the list of media outlets purchased, as applicable);
- Deliver a CD, DVD, encrypted flash drive, and/or electronic transfer of the master copy of final "ready-to-use" artwork/materials (including all working files e.g., layered or native files, text files, graphics, images, etc.) to the Project Authority; and
- Manage and ensure quality control of sub-Contractor' work.
- Coordinate creative direction and production to address media recommendations made by the AOR as part of its services
- Manage and balance urgent and competing requests that may arise with little notice and short turnaround time.

All "studio" services including items such as file retrieval, burning CDs, upload to extranet, mounting and mock-ups, etc. to support the development of advertising and marketing materials are to be included within the production services category as identified above.

## 10. ADMINISTRATIVE SUPPORT SERVICES

The Contractor is required to provide administrative support services including:

- Project invoices, in accordance with the invoicing instructions, and each task authorization
- Provide reports by e-mail to Project Authority detailing the time and resources used to provide the services requested through a task authorization
- Provide estimates as requested by the Project Authority and as per each task authorization

- Provide for a process to ensure that at the end of a contract, all deliverables are delivered to the Crown (within 30 days of the expiry of the contract or within timelines set-out by the Project Authority in a task authorization) and in final workable formats. This process, to occur in the final year of the contract, must be developed and approved in consultation with the PA.

These services are part of the overall services to be provided by the Contractor and as such, the Project Authority will not be charged separately for the production or supply of these services. Since these costs are considered overhead, the Contractor is required to integrate them into the hourly rates in the basis of payment when producing their bid.

## **11. DELIVERABLES**

The Contractor must provide the services outlined in Section 9 of this Statement of Work for the initial contract period and up to three (3) one (1) year option periods.

## **12. ASSISTANCE SUPPLIED BY DEPARTMENT**

For each topic or area of focus identified, the Project Authority will be responsible for the following activities:

- Providing a creative brief to the agency
- Providing existing creative and evaluations of relevant past campaigns
- Providing a Project Manager (Marketing Advisor) dedicated to agency liaison
- Providing relevant Public Opinion Research
- Providing background information for content of fulfillment pieces (graphical elements, campaign tag line and Web address to be added by the Contractor)
- Obtaining and providing approvals from HC and PHAC management and the GC agencies as required

A Marketing Advisor from the MPCSD will be dedicated to being the liaison with the Contractor and will be available to the Contractor Monday to Friday to provide relevant research (working with POR and internal Program contacts), marketing plans and any other necessary documents required by the Contractor.

## **13. MEETINGS**

For each campaign, the Contractor is expected to participate in an initial briefing with the AOR, by phone or in person (to be identified by the PA), to discuss the Campaign Brief document, as well as participate in meetings (schedule to be identified by the PA) to ensure campaign integration between the creative and media strategies.

The Contractor may be asked to participate in meetings with HC in Ottawa in person and as requested, by phone with various audiences. Many of the meetings will involve examination, assessment and refinement of marketing materials that can only be accomplished by in-person collaboration.

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#### **14. TRAVEL**

HC will pay reasonable travel expenses for the Contractor's representative(s) in accordance with the Treasury Board Travel Guidelines (available at the following web site: [www.tbs-sct.gc.ca/psm-fpfm/pay-remuneration/travel-deplacements/menu-travel-voyage-eng.asp](http://www.tbs-sct.gc.ca/psm-fpfm/pay-remuneration/travel-deplacements/menu-travel-voyage-eng.asp)) at the time of travel to attend in person these meetings and when requested for marketing discussions that necessitate in person collaboration. Where travel is deemed necessary, the Contractor will submit a cost estimate to the Project Authority for authorization prior to traveling.

Payment for travel and living expenses must be made in accordance to the terms of payment and the *National Joint Council Travel Directive*.

## ANNEX "B"

### BASIS OF PAYMENT

#### NOTE TO BIDDERS:

Bidders must submit an hourly rate for each of the three (3) key categories of services and one (1) blended hourly rate (see table below under B.1). The blended hourly rate to be submitted is the rate the Bidder will charge for any services not covered by the key categories such as (but not limited to):

- Graphic Design
- Copy Writing (English or French)
- Copy Editing (English or French)
- Translation and Adaptation
- Proofreading (English and French)
- Production Coordination Services
- Public Relations (Strategy Development and Implementation)

The Bidder will be paid in accordance with the following Basis of Payment for Work performed pursuant to any TA. Bidders must include all agency charges in their hourly rates as no other agency fee or commission will be payable above these rates. The hourly rates are firm and will be used in the evaluation.

#### B.1 FIRM HOURLY RATES

The Contractor will be paid firm hourly rates as follows, for work performed in accordance with the Contract. They include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only Applicable Taxes. All expenses normally incurred in providing the services (i.e. project office space [including Contractor's hardware and software], word processing, work estimates, photocopying, courier and telephone charges, local travel and the like) are included in the firm hourly rates identified herein, and will not be permitted as direct charges under the Contract. Suppliers are not permitted to charge hourly rates to prepare work estimates or task authorizations.

The rates must be in Canadian currency, Customs duties are included and Applicable Taxes is extra.

**NOTE: Bidders must include all agency charges in their hourly rates as no other agency fees or commissions will be payable above these rates.**

Category of Service	Hourly Rate Contract Period	Hourly Rate Option Period 1	Hourly Rate Option Period 2	Hourly Rate Option Period 3
Account Management & Coordination Services	\$ _____	\$ _____	\$ _____	\$ _____
Strategic Services	\$ _____	\$ _____	\$ _____	\$ _____
Creative and Production Services	\$ _____	\$ _____	\$ _____	\$ _____
Blended Rate	\$ _____	\$ _____	\$ _____	\$ _____

## **B.2 PRODUCTION COSTS**

The production costs are costs associated with the production of the ads and marketing/partnership activities and products, excluding the professional fees billed as hourly rate. Production costs will be reimbursed at cost, as subcontracted services and direct expenses.

### **B.2.1 SUBCONTRACTED SERVICES**

The Contractor will be reimbursed at cost for any actual expenditure reasonably and properly incurred to acquire goods and services from outside suppliers at the supplier's price, net of any trade or prompt payment discounts.

#### **FOR EACH SUBCONTRACTED SERVICE OVER \$25,000.00 (GST / HST INCLUDED)**

The Contractor will obtain competitive bids from no less than three (3) outside suppliers. The Contractor must provide to the Contracting Authority and the Project Authority, the names of the suppliers who submitted bids, the total amount of each bid obtained, the selection criteria and results. A subcontracted service over \$25,000 (Applicable Taxes included) applies to the total aggregate of the dollar value of each subcontracted service per resulting Contract against a resulting Contract.

### **B.2.2 DIRECT EXPENSES**

The professional fees submitted in B.1 are all inclusive.

The Contractor will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the Work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers, given the service(s) is/are documented in the approved Contract against a Supply Arrangement. All such direct expenses must have prior authorization of the Project Authority.

## **B.3 TRAVEL AND LIVING EXPENSES**

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive <http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>, and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All payments are subject to audit by Canada.

All travel must have prior authorization of the Project Authority.

## **B.4 CONTRACTUAL JOINT VENTURE (IF APPLICABLE)**

The Bidder is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name at contract award), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition, it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.



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## ANNEX "C" TASK AUTHORIZATION FORM

All invoices/progress claims must show the reference Contract and Task numbers.		Contract no. • No du contrat
Toutes les factures doivent indiquer les numéros du contrat et de la tâche.		Task no. • No de la tâche
Title of the task, if applicable • Titre de la tâche, s'il y a lieu		Total estimated cost of task (GST/HST extra) • Coût total estimatif de la tâche (TPS/TVH en sus)
TA revision no. • No de révision de l'AT	Increase/decrease • Augmentation/réduction	Previous value • Valeur précédente
To • À	<b>TO THE CONTRACTOR</b> You are requested to supply the following services in accordance with the terms of the above reference contract. Only services included in the contract shall be supplied against this task.  Please advise the undersigned if the completion date cannot be met. Invoices/progress claims shall be prepared in accordance with the instructions set out in the contract.  <b>À L'ENTREPRENEUR</b> Vous êtes priés de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seuls les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande.  Prière d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.	
Delivery location • Expédiez à		

### Start of the Work for a TA

Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.

### Début des travaux pour l'AT

Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.

Task description of the work required • Description de tâche des travaux requis	See attached • Ci-joint <input type="checkbox"/>
Directives	See attached • Ci-joint <input type="checkbox"/>
Deliverables • Produits à livrer	See attached • Ci-joint <input type="checkbox"/>
Completion and submission dates • Dates d'achèvement et dates de livraison	See attached • Ci-joint <input type="checkbox"/>
TA revision description • Description de la révision de l'AT	See attached • Ci-joint <input type="checkbox"/>
Basis and method of payment • Base et méthode de paiement	

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**Authorization(s)**

By signing this TA, the authorized Project Authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

The Project Authority's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

**Autorisation(s)**

En apposant sa signature sur l'AT, le chargé de projet autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

La limite d'autorisation du chargé de projet est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

Name and title of authorized Project Authority • Nom et titre du chargé de projet autorisé à signer	
Signature	Date
PWGSC Contracting Authority • Autorité contractante de TPSGC	
Signature	Date

**Contractor's Signature • Signature de l'entrepreneur**

Name and title of individual authorized to sign for the Contractor • Nom et titre de la personne autorisée à signer au nom de l'entrepreneur	
Signature	Date

<input type="checkbox"/> Estimate received from Contractor • Devis reçu de l'entrepreneur	See attached • Ci-joint <input type="checkbox"/>
Date	Initials • Initiales

<input type="checkbox"/> Revised Estimate received from Contractor • Devis révisé reçu de l'entrepreneur	See attached • Ci-joint <input type="checkbox"/>
Date	Initials • Initiales

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## **ANNEX “D” to PART 3 OF THE BID SOLICITATION**

### **ELECTRONIC PAYMENT INSTRUMENTS**

*As indicated in Part 3, clause 3.1.2, the Bidder must complete the information requested below, to identify which electronic payment instruments are accepted for the payment of invoices.*

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- ☐ ( ) VISA Acquisition Card;
- ☐ ( ) MasterCard Acquisition Card;
- ☐ ( ) Direct Deposit (Domestic and International);
- ☐ ( ) Electronic Data Interchange (EDI);
- ☐ ( ) Wire Transfer (International Only);
- ☐ ( ) Large Value Transfer System (LVTS) (Over \$25M)

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## ANNEX "E" to PART 5 OF THE BID SOLICITATION

### FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: \_\_\_\_\_ (YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- ☐ A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- ☐ A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

OR

- ☐ B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

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## ANNEX “F”

### TECHNICAL AND FINANCIAL EVALUATION

#### 1. TECHNICAL EVALUATION

##### SECTION A – INSTRUCTIONS TO BIDDERS

1. In order to facilitate the evaluation of the proposal, PSPC requests that bidders address and present topics in the same order and with the same headings as the evaluation criteria. Bidders should clearly identify where in their proposal each criterion is addressed.
2. If more projects/samples are provided than the requirements of the criterion, only the first projects/samples in the proposal will be evaluated. Any excess projects/samples will not be evaluated.
3. Projects/Samples start dates must not pre-date the maximum allowable as stated in the Mandatory/Technical evaluation criteria. For projects/samples “completed” dates, please see definitions section of this template (section B).
4. Review the “Submission Requirements” section at the bottom of each Mandatory evaluation criteria and at the top of the Rated Technical Evaluation Criteria section for specifics related to each individual requirement.

##### SECTION B – DEFINITIONS

**National Campaign** – The campaign was delivered in at least four (4) regions in Canada. One of these four (4) regions must be Quebec. The six (6) possible regions are: British Columbia, Prairies, Ontario, Quebec, Atlantic and the Territories.

**Multi-Media Campaign** – The campaign was a mix of at least three different media (any of the following: TV; print; radio; out-of-home; internet; cinema; social media, etc.). One of these must include mobile placements.

**Produced and Completed** – The start date of the campaign, or the submitted portion/phase of an overall campaign, cannot pre-date the allowable date stated in the evaluation criteria. While the campaign can be ongoing, the submitted portion/phase must have been broadcast or published in the appropriate media, and results must be available (for all submitted media types).

**Social marketing campaign** – A campaign that builds awareness about a social issue and works to change people’s behaviors or attitudes for the public good.

**Partnership Strategy** - A strategy proposing at least two parties having mutual objectives, mutual benefits, shared responsibility and decision-making and shared risk (for example, community networks, non-governmental organizations or professional associations). One party is not paying the other party to do something. Media partnerships are not included.

The following scoring grid will be used to evaluate each of the rated criteria:

Percentage Factor	Percentage of total	Rating Level
0	0%	<b>Insufficient</b> relevant information provided. Unable to evaluate.
1	20%	<b>Unacceptable</b> - Information provided demonstrates that the Bidder's approach or experience does not meet the stated criteria and overall requirement.
2	40%	<b>Poor</b> - Information provided demonstrates that the Bidder's approach or experience only partially meets the stated criteria or is only partially relevant to the overall requirement.
3	60%	<b>Good</b> – <b><u>This is the established minimum.</u></b> Information provided demonstrates that most elements of the Bidder's approach or experience meet the stated criteria and are relevant to the overall requirement.
4	80%	<b>Very Good</b> - Information provided demonstrates that all elements of the Bidder's approach or experience meet the stated criteria and are relevant to the overall requirement.
5	100%	<b>Excellent</b> – Information provided demonstrates that all elements of the Bidder's approach or experience exceed the stated criteria and are highly relevant to the overall requirement.
<b>EVALUATOR INSTRUCTIONS:</b> 1. Only the percentage factors indicated in the above table are to be entered into the evaluation grids that follow. In other words, evaluators MUST choose from ONLY the following available percentage factors: 1, 2, 3, 4, 5 and 0. Factors such as 1.75, 2.5, etc. MUST NOT be used. 2. The "points" and "total points" boxes in the grids will be calculated based on the percentage factor(s) assigned. Evaluators MUST NOT select a number for "points" which does not correspond to a percentage factor. For example, 2.5/10 is not an acceptable score as 2.5 is not available.		

#### TABLE A - MANDATORY TECHNICAL EVALUATION CRITERIA

M1. Experience	SCORING	
The Bidder MUST submit two (2) advertising and/or marketing campaigns, produced and completed within the last three (3) years of bid closing date, that combine to meet the following:		
▪ One (1) multi-media campaign	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
▪ One (1) social marketing campaign	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
▪ One (1) campaign that was originally produced in both official languages	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
▪ One (1) national campaign which targeted a specific demographic (other than “general population”)	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
▪ One (1) campaign that included social media advertising	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
NOTE: These two campaigns will be evaluated under the Rated Technical Evaluation Criteria below.		
Submission Requirements		
Bidder MUST complete the M1 checklist above		

<b>M2. Ability to Communicate in English and French</b>	<b>SCORING</b>	
The Bidder must have the capability to provide all services described in the Statement of Work (SOW), in English and French, as and when required.	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
<b>Submission Requirements</b>		
<b>Bidder MUST complete the M2 checklist above</b>		

<b>M3. Additional Mandatory Criteria</b>	<b>SCORING</b>	
The Bidder must have experience in developing a partnership strategy.	MET <input type="checkbox"/>	NOT MET <input type="checkbox"/>
<b>Submission Requirements</b>		
<b>Bidder MUST complete the M3 checklist above</b>		

## TABLE B - RATED TECHNICAL EVALUATION CRITERIA

<b>INSTRUCTIONS</b>
The Bidder must provide a detailed written description of the two (2) advertising and/or marketing campaigns, produced and completed within the last three (3) years of bid closing date, that combine to meet the elements outlined in M1.
Each written description will be evaluated against R1, R2, R3, R4 and R5 as outlined below.
The Bidder must provide a detailed summary of a partnership strategy they developed including conducting the research and identifying potential partners.
The written description will be evaluated against R6 as outlined below.
<b>Submission Requirements</b>
Maximum eighteen (18) pages to respond to all rated technical evaluation criteria combined (R1, R2, R3, R4, R5 and R6). Additional pages will not be considered.

**NOTE:** Copies of the actual creatives may be submitted within the written response as support elements to the following Rated Technical Evaluation Criteria. They will count towards the page limits. They will not be evaluated. If creative samples are submitted as separate additional documents or files, they will not be reviewed.

### R1. Background

- Who was the client and what was the campaign title?
- What was the agency's role? What were you hired to do?
- What was the context of the campaign?
- Were there specific challenges or considerations related to the campaign?
- What were the campaign objectives?  
For the social marketing example, define how the strategy met a social marketing objective.
- Who was the target audience(s)?
- In which region(s) and language(s) was the campaign delivered?
- What were the campaign start and end dates (including month and year for each)? If you're submitting a portion or phase of an overall campaign, please include the start and end date of that portion/phase.

<b>Maximum Points</b>	<b>10 Pts (5 Pts per example)</b>		<b>Bidder Score</b>	<b>___ / 10</b>
<b>Minimum Points</b>	<b>6 Pts (3 Pts per example)</b>			

### R2. Campaign Strategy Development

- What was the overall campaign strategy? How did you determine that strategy and why? On what data, information, insights, challenges or considerations were the recommendations based?
- What were the tactics and/or the media mix recommended to support the campaign and why?
- How did you present the campaign strategy to your client to secure approval, including the rationale that supported your positioning and the arguments that solidified and supported your overall approach or strategy?
- What was the client reaction to the campaign strategy presentation? How did you secure approval? How was client feedback integrated into the overall campaign strategy?
- What challenges did you face during the development, presentation and implementation of the campaign strategy if any? How did you overcome those challenges?

<b>Maximum Points</b>	<b>15 Pts (7.5 Pts per example)</b>		<b>Bidder Score</b>	<b>___ / 15</b>
<b>Minimum Points</b>	<b>9 Pts (4.5 Pts per example)</b>			

### R3. Creative Strategy Development

- What was the foundation to support the creative development? How did you determine this approach and why (with respect to audience and media channel)?
- How did your creative approach and tone support the overall campaign strategy? What was the connection to the objectives, media mix and audiences?
- How did your creative strategy impact the tactics and/or media mix recommended? Did the creative approach drive media selection or vice versa?
- Explain how the creative approach was innovative and suited the campaign objectives.
- How did you "sell" the creative approach to your client? How did you present it to make it compelling and secure approval?
- What was the client reaction to the creative approach presented? How did you secure approval? How was client feedback integrated into the overall creative approach?
- What were the challenges during the development and presentation of the creative strategy? How did you overcome those challenges?



<b>Maximum Points</b>	<b>15 Pts (7.5 Pts per example)</b>		<b>Bidder Score</b>	<b>___ / 15</b>
<b>Minimum Points</b>	<b>9 Pts (4.5 Pts per example)</b>			

#### R4. Production Capacity and Execution

- How was the approved creative strategy implemented and executed?
- Did you experience delays and if so how did you resolve or manage them?
- Considering the selected media tactics, how were the creative products developed for the specific media channels and why was this determined?
- Specifically, what type of creative material was developed? Were there regional, audience-specific or other types of variations produced? How many? Why?
- How did you manage and coordinate the production of all the creative elements to ensure appropriate quality control and delivery under approved timelines? How did you ensure proper budget controls?
- How did you address talent management, copyright or other production considerations?
- How did you adapt the creative to suit cultural differences between French and English markets?
- How did you manage client approval of the creative material? How were comments/feedback integrated?
- How was the execution of the overall campaign managed? How did you ensure appropriate oversight, coordination and flexibility, including timelines and budget controls? How did you adapt the campaign and the execution to the changing environment as required?
- How did you manage communication with the client throughout the campaign? How did you seek client input and approval as required?
- What were the challenges during the creative production process and campaign execution? How did you overcome those challenges?
- How did you manage your internal ability to deal with multiple simultaneous demands (e.g. within a project and coming from different teams) or with multiple rush/urgent demands?
- How did you deal with unforeseen or continuous changes by the client?

<b>Maximum Points</b>	<b>30 Pts (15 Pts per example)</b>		<b>Bidder Score</b>	<b>___ / 30</b>
<b>Minimum Points</b>	<b>18 Pts (9 Pts per example)</b>			

#### R5. Performance and Reporting

- What were the results of the overall campaign? Did it achieve the intended results? How did it perform against the KPIs and objectives? What was the measurement approach to assess the performance of the campaign?
- What were the results of the creative approach? Did it achieve what was proposed or anticipated? What were the audience reactions and outcomes achieved?
- How did you monitor campaign and creative performance throughout the campaign? Were any modifications or optimizations implemented due to performance factors? If so, please describe. How did you seek client approval for those optimizations and modifications?
- How did you communicate campaign and creative results to your client throughout the campaign? How were post-campaign evaluations and post-mortems produced and presented?

<b>Maximum Points</b>	<b>15 Pts (7.5 Pts per example)</b>		<b>Bidder Score</b>	<b>___ / 15</b>
<b>Minimum Points</b>	<b>9 Pts (4.5 Pts per example)</b>			

## R6. Partnership Strategy Development

- How did you determine the partnership strategy and why?
- On what data, information, insights, challenges or considerations were the partnership recommendations based?
- How did you present the partnership strategy to your client to secure approval, including the rationale that supported your positioning and the arguments that solidified and supported your overall approach or strategy?
- What was the client reaction to the partnership strategy presentation? How did you secure approval? How was client feedback integrated into the final partnership strategy?
- What challenges did you face during the development, presentation and implementation of the campaign strategy if any? How did you overcome those challenges?

<b>Maximum Points</b>	<b>5 Pts</b>		<b>Bidder Score</b>	<b>___ / 5</b>
<b>Minimum Points</b>	<b>3 Pts</b>			

## 2. FINANCIAL EVALUATION

The figures below are for demonstration purposes only and do not represent current or expected hourly rates for advertising services.

To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20%.

The financial scores will be calculated as follows:

**Step 1:** For each Bidder, an average hourly rate per category of service will be calculated using the rates submitted for each of the four periods of the contract (initial contract period, and the option periods).

### Example of Step 1:

#### Firm A

Category of Service	Hourly Rate Contract Period	Hourly rate Option Period 1	Hourly rate Option Period 2	Hourly rate Option Period 3	Average Rate
Account Management & Coordination Services	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
Strategic Services	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
Creative and Production Services	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
Blended Rate	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00

#### Firm B

Category of Service	Hourly Rate Contract Period	Hourly rate Option Period 1	Hourly rate Option Period 2	Hourly rate Option Period 3	Average Rate
Account Management & Coordination Services	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00
Strategic Services	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00

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File No. - N° du dossier  
cz008.HT399-19-3822/A

Buyer ID - Id de l'acheteur  
cz008  
CCC No./N° CCC - FMS No./N° VME

Creative and Production Services	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00
Blended Rate	\$105.00	\$105.00	\$105.00	\$105.00	\$105.00

#### Firm C

Category of Service	Hourly Rate Contract Period	Hourly rate Option Period 1	Hourly rate Option Period 2	Hourly rate Option Period 3	Average Rate
Account Management & Coordination Services	\$185.00	\$195.00	\$205.00	\$205.00	\$197.50
Strategic Services	\$235.00	\$245.00	\$255.00	\$255.00	\$247.50
Creative and Production Services	\$235.00	\$245.00	\$255.00	\$255.00	\$247.50
Blended Rate	\$150.00	\$155.00	\$160.00	\$160.00	\$156.25

#### Firm D

Category of Service	Hourly Rate Contract Period	Hourly rate Option Period 1	Hourly rate Option Period 2	Hourly rate Option Period 3	Average Rate
Account Management & Coordination Services	\$75.00	\$75.00	\$85.00	\$85.00	\$80.00
Strategic Services	\$75.00	\$75.00	\$85.00	\$85.00	\$80.00
Creative and Production Services	\$75.00	\$75.00	\$85.00	\$85.00	\$80.00
Blended Rate	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00

#### Firm E

Category of Service	Hourly Rate Contract Period	Hourly rate Option Period 1	Hourly rate Option Period 2	Hourly rate Option Period 3	Average Rate
Account Management & Coordination Services	\$150.00	\$155.00	\$160.00	\$165.00	\$157.50
Strategic Services	\$150.00	\$155.00	\$160.00	\$165.00	\$157.50
Creative and Production Services	\$150.00	\$155.00	\$160.00	\$165.00	\$157.50
Blended Rate	\$150.00	\$155.00	\$160.00	\$165.00	\$157.50

**Step 2:** The highest and lowest average hourly rate per category of service will be removed prior to calculation the overall average rate per category. If there are three or fewer bidders, no hourly rates will be removed.

#### Example of Step 2:

Bidder	Account Management & Coordination Services	Strategic Services	Creative and Production Services	Blended Rate
FIRM A	\$100.00	\$100.00	\$100.00	\$75.00
FIRM B	\$105.00	\$105.00	\$105.00	\$105.00
FIRM C	\$197.50	\$247.50	\$247.50	\$156.25
FIRM D	\$80.00	\$80.00	\$80.00	\$50.00
FIRM E	\$157.50	\$157.50	\$157.50	\$157.50
OVERALL AVERAGE	\$120.83	\$120.83	\$120.83	112.08

**Step 3:** If any Bidder's average hourly rate per category is more than 50% below or 100% above the overall average of a category of service, its bid will be considered non-responsive.

#### Example of Step 3:

Bidder	Account Management & Coordination Services	Strategic Services	Creative and Production Services	Blended Rate
FIRM A	\$100.00	\$100.00	\$100.00	\$75.00
FIRM B	\$105.00	\$105.00	\$105.00	\$105.00
FIRM C	\$197.50	\$247.50	\$247.50	\$156.25
FIRM D	\$80.00	\$80.00	\$80.00	\$50.00
FIRM E	\$157.50	\$157.50	\$157.50	\$157.50
OVERALL AVERAGE	\$120.83	\$120.83	\$120.83	112.08
Maximum Responsive	\$241.66	\$241.66	\$241.66	\$224.16
Minimum Responsive	\$60.42	\$60.42	\$60.42	\$56.04

The bid from Firm C would be non-responsive as it did not meet the maximum responsive hourly rate for three categories. The bid from Firm D would be non-responsive as it did not meet the minimum responsive hourly rate for the Blended Rate.

**Step 4:** The weighted Financial Score will be determined per category of service

**Example of Step 4:**

$$\frac{\text{Lowest Responsive Hourly Rate}}{\text{Bidder's Hourly rate}} \times 5 = \text{Weighted Financial Score per Category}$$

BIDDER	Account Management & Coordination Services	Weighted Financial Score
FIRM A	\$100.00	5.00
FIRM B	\$105.00	4.76
FIRM E	\$157.50	3.17

BIDDER	Strategic Services	Weighted Financial Score
FIRM A	\$100.00	5.00
FIRM B	\$105.00	4.76
FIRM E	\$157.50	3.17

BIDDER	Creative and Production Services	Weighted Financial Score
FIRM A	\$100.00	5.00
FIRM B	\$105.00	4.76
FIRM E	\$157.50	3.17

BIDDER	Blended Rate	Weighted Financial Score
FIRM A	\$75.00	5.00
FIRM B	\$105.00	3.57
FIRM E	\$157.50	2.38

**Step 5:** The Total Financial Score will be calculated by adding all of the weighted Financial Scores per category.

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File No. - N° du dossier  
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Buyer ID - Id de l'acheteur  
cz008  
CCC No./N° CCC - FMS No./N° VME

BIDDER	Account Management & Coordination Services	Strategic Services	Creative and Production Services	Blended Rate	TOTAL FINANCIAL SCORE
FIRM A	5.00	5.00	5.00	5.00	20.00
FIRM B	4.76	4.76	4.76	3.57	17.85
FIRM E	3.17	3.17	3.17	2.38	11.89