



<p>RETURN BIDS TO: RETOURNER LES SOUMISSIONS À:</p> <p>Bid Receiving - Environment Canada / Réception des soumissions – Environnement Canada</p> <p>Electronic Copy: ec.soumissions-bids.ec@canada.ca</p> <p>BID SOLICITATION DEMANDE DE SOUMISSIONS</p> <p>PROPOSAL TO: ENVIRONMENT CANADA</p> <p>We offer to perform or provide to Canada the services detailed in the document including any attachments and annexes, in accordance with the terms and conditions set out or referred to in the document, at the price(s) provided.</p> <p>SOUSSION À: ENVIRONNEMENT CANADA</p> <p>Nous offrons d'effectuer ou de fournir au Canada, aux conditions énoncées ou incluses par référence dans le document incluant toutes pièces jointes et annexes, les services détaillés dans le document, au(x) prix indiqué(s).</p>	<p>Title – Titre Establishing a User Needs Analysis Frame Work for the Canadian Center for Climate Services</p>	
	<p>EC Bid Solicitation No. /SAP No. – N° de la demande de soumissions EC / N° SAP : 5000054103</p>	
	<p>Date of Bid solicitation (YYYY-MM-DD) – Date de la demande de soumissions (AAAA-MM-JJ) : 2020-11-02</p>	
	<p>Bid Solicitation Closes (YEAR-MM-DD) - La demande de soumissions prend fin (AAAA-MM-JJ)</p> <p>at – à 3:00 P.M. on – le 2020-11-16 (15 days after)</p>	<p>Time Zone – Fuseau horaire</p> <p>Eastern Standard Time (EST)</p> <p>Heure normal de L'Est (ENT)</p>
	<p>F.O.B – F.A.B Destination</p>	
	<p>Address Enquiries to - Adresser toutes questions à Francisco.Santamaria@canada.ca</p>	
	<p>Telephone No. – N° de téléphone Not Available Via Phone until futhure notice</p>	<p>Fax No. – N° de Fax</p>
	<p>Delivery Required (YEAR-MM-DD) – Livraison exigée (AAAA-MM-JJ) March 31, 2021</p>	
	<p>Destination - of Services / Destination des services 200 Sacré-Cœur, Fontaine Building, 11th Floor Gatineau, Quebec J8X 4C6</p>	
	<p>Security / Sécurité No security requirements apply to this request. Aucune exigence relative à la sécurité ne s'applique à cette demande.</p>	
<p>Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/de l'entrepreneur</p>		
<p>Telephone No. – N° de téléphone</p>	<p>Fax No. – N° de Fax</p>	
<p>Name and title of person authorized to sign on behalf of Vendor/Firm: (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</p>		
<p>Signature</p>	<p>Date</p>	

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION

1. Introduction
2. Summary
3. Debriefing

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions
2. Submission of Bids
3. Former Public Servant
4. Enquiries - Bid Solicitation
5. Applicable Laws
6. Basis for Canada's Ownership of Intellectual Property

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures
2. Basis of Selection

PART 5 - CERTIFICATIONS

1. Certifications Required Precedent to Contract Award
2. Certifications Required with the Bid

PART 6 - RESULTING CONTRACT

1. Statement of Work
2. Standard Clauses and Conditions
3. Security Requirement
4. Term of Contract
5. Authorities
6. Proactive Disclosure of Contracts with Former Public Servants
7. Payment
8. Invoicing Instructions
9. Certifications
10. Applicable Laws

List of Annexes:

- | | |
|---------|-------------------|
| Annex A | Statement of Work |
| Annex B | Basis of Payment |

PART 1 - GENERAL INFORMATION

PART 1 - INFORMATION AND INSTRUCTIONS

1. Security requirements

1.1 There is no security requirement associated with this requirement.

2. Statement of work

The work to be performed is described in section 2.2 of the Statement of Work of the resulting contract clauses.

3. Reports

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within fifteen (15) working days of receipt of the results of the bid solicitation process. The debriefing can be provided in writing.

PART 2 - BIDDER INSTRUCTIONS

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 PWGSC *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, 2020-05-28 Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

The standard instructions 2003 are modified as follows:

Under “Text” at 02:

Delete: “Procurement Business Number”

Insert: “Deleted”

At Section 02 Procurement Business Number

Delete: In its entirety

Insert: “Deleted”

At Section 05 Submission of Bids, Subsection 05 (2d):

Delete: In its entirety

Insert: “send its bid only to Environment Canada (EC) as specified on page 1 of the bid solicitation or to the address specified in the bid solicitation;”

At Section 06 Late Bids:

Delete: "PWGSC"

Insert: "Environment Canada"

At Section 07 Delayed Bids:

Delete: "PWGSC"

Insert: "Environment Canada"

At Section 08 Transmission by Facsimile, Subsection 08 (1):

Delete: In its entirety

Insert: "Bids may be submitted by facsimile if specified in the bid solicitation."

At Section 12 Rejection of Bid, Subsection 12 (1) a. and b.:

Delete: In their entirety

Insert: "Deleted"

At Section 17 Joint Venture, Subsection 17 (1) b.:

Delete: "the Procurement Business Number of each member of the joint venture,"

Insert: "Deleted"

At Section 20 Further Information, Subsection 20 (2):

Delete: In its entirety

Insert: "Deleted"

1.1 PWGSC SACC Manual Clauses

A7035T (2007-05-25), List of Proposed Subcontractors (

2. Submission of Bids

2.1 Bids must be submitted to Environment Canada (EC) at the address and by the date, time and place indicated on page 1 of the bid solicitation.

3. Former Public Servant – Competitive Bid

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 FPS, 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 FPS 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.

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than Three (3) working 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.

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.

6. Basis for Canada's Ownership of Intellectual Property

Environment Canada 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 grounds:

the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge

and information for public dissemination;

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I: Technical Bid one (1) electronic copy in PDF format.

Section I: Financial Bid one (1) electronic copy in PDF format.

Section III: Certifications one (1) electronic copy in PDF format.

Section IV: Additional Information one (1) electronic copy in PDF format.

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

In order to be considered, bids must be received no later than 1500h (3 p.m.) (Eastern Time) on the date and time indicated on the cover page to herein as the "Closing Date." Bids received after the Closing Date will be considered non-responsive and will not be considered for contract award. Bids submitted by email must be submitted ONLY to the following email address:

Email Address: ec.soumissions-bids.ec@canada.ca

Attention: Francisco Santamaria

Solicitation Number: 5000054103

Bidders should ensure that their name, address, Closing Date of the solicitation and Solicitation Number are clearly indicated in the body of their email. Bids and supporting information may be submitted in either English or French.

The total size of the email, including all attachments, must be less than 15 megabytes (MB). It is each Bidder's responsibility to ensure that the total size of the email does not exceed this limit.

Bids sent by fax will not be accepted.

It is important to note that emails systems can experience systematic delays and, at times, large attachments may cause systems to hold or delay transmission of emails. It is solely the Bidder's responsibility to ensure that the Contracting Authority receives a bid on time, in the mailbox that has been identified for bid receipt purposes. Date stamps for this form of transmission are not acceptable.

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.

Section II: Financial Bid

- 1.1 Bidders must submit their financial bid in accordance with the "Financial Bid Presentation Sheet in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.
- 1.2 Bidders must submit their financial bid in Canadian funds and in accordance with the Financial Bid Presentation Sheet in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately.
- 1.3 Bidders must submit their prices and rates FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.

Section III: Certifications

Bidders must submit the certifications required under Part 5.

**ATTACHMENT ONE (1) TO PART 3 -
FINANCIAL BID PRESENTATION SHEET**

- 1.0** The Bidder must complete this Financial Bid Presentation Sheet and include it in its financial bid.
- 2.0** The inclusion of volumetric data in this document does not represent a commitment by Canada that Canada’s future usage of the services described in the bid solicitation will be consistent with this data.
- 3.0** FINANCIAL BID PRESENTATION SHEET

The tenderer must complete the presentation sheet of the financial bids and include in its financial bid when completed. At the very least, the bidder must meet this financial bid Format Sheet by including in its financial bid for the periods indicated below as per the following milestones;

Insert Periods

From Contract award until March 31, 2021

Tasks	Estimated number of hours (A)	Per diem rate (B)	TOTAL AXB
Task 5.1	_____ hours	\$	\$
5.2	_____ hours		\$
5.3	_____ hours		\$
5.4	_____ hours		\$
5.5	_____ hours		\$
Bidder’s Grand Total Price excluding applicable taxes			\$

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1.0 Evaluation Procedures

Bids will be evaluated against all the requirements of the bid solicitation, including the technical and financial evaluation criteria.

1.1 Technical Evaluation

Except where expressly provided otherwise, the experience described in the bid must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered.

Mandatory and point rated technical evaluation criteria are included in Attachment 2 to Part 4.

1.2 Financial Evaluation

1.2.1 Evaluation of Price

The price of the bid will be evaluated in Canadian dollars, the Applicable Taxes excluded, Canadian customs and excise taxes included.

For evaluation purposes only, the price of the bid will be determined as follows:

1.2.2 For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with the Financial Bid Presentation Sheet detailed in Attachment 1 to Part 3.

2. Basis of Selection

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum points specified for each criterion for the technical evaluation, and
 - d. obtain the required minimum of 70 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 100 points.
2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

Example of calculation:

		Company 1	Company 2	Company 3
Overall Technical Score		12/20	14/20	16/20
Evaluated bid Price		40,000.00\$	65,000.00\$	60,000.00\$
Calculations	Technical	$12/20 \times 70 = 42$	$14/20 \times 70 = 49$	$16/20 \times 70 = 56$
	Price	$40/40 \times 30 = 30$	$40/65 \times 30 = 18.46$	$40/60 \times 30 = 20$
Combined Rating		72	67.46	76
Placing		2 nd	3 rd	1 st

Company 3 wins the contract

**ATTACHMENT TWO (2) TO PART 4,
MANDATORY TECHNICAL CRITERIA AND POINT RATED TECHNICAL CRITERIA**

1. Proposal Format

The proposal is to contain the following components, upon which it will be evaluated:

- Understanding of the Project
- Approach and Methodology
- Project management approach
- A work-plan, which includes the breakdown of hours by personnel

2. Proposal Length

The proposal length should not exceed 30 pages, not including Curriculum Vitae.

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

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

Item	Mandatory Technical (MT) Requirements	Met/Not Met	Bid Page#
M1	The Bidder must demonstrate the project team has a minimum of 1 completed project pertaining to the use of climate information to support climate change impacts, risk or vulnerability assessment and/or adaptation planning for an organization within Canada within the past 5 years.		
M2	The Bidder must demonstrate the project team has a minimum of 1 completed project in conducting research and analysis of user needs and/or developing and testing frameworks to characterize and categorize user needs for an organization within Canada within the past 5 years.		
M3	The Bidder must demonstrate the members of the project team have experience in using a variety of information sources to produce professional reports and accompanying graphics . This must be demonstrated through reference to reports completed by the members of the project team within the past 5 years that contain a combination of academic and grey literature references and consultation efforts.		
M4	The Bidder must demonstrate the Project Lead has experience in working directly with Indigenous communities and/or organizations within the past 5 years.		

Mandatory Financial Criteria

Item	Evaluation Criteria	Met	Not Met
MF1	The total amount of the bid will not exceed 55,000\$ not including taxes.		

Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

Item	Summary of Point Rated (PR) Technical Criteria	Bid Page#	Min Points Required	Max Points	Score
PR1	Understanding of the Project		7	10	
PR2	Approach and Methodology		21	30	
PR3	Proposal Quality		7	10	
PR4	Qualification and Experience of Company (Relevant Projects)		21	30	
PR5	Qualification and Experience of Company (Proposed Resource Team)		14	20	
	TOTAL		70	100	

	<u>Understanding of the Project</u>		REQUIRED SCORE
PR1	<p>The Bidder should demonstrate an informed and knowledgeable understanding of CCCS' requirement to develop a user needs analysis framework that provides insights into climate information users, their diverse needs and thereby inform the development of climate services and products. The framework is expected to support the scaling up of climate services in the long term by characterizing user needs in the form of archetypes to more effectively deliver tailored services and evaluate their impact and success.</p> <p>a. Demonstrates a comprehensive knowledge and understanding of the need and utility of developing a user needs analysis framework that provides insights into climate information users are, what needs they have and how that can inform the development of climate services and products. This would include an analysis of how the demand for climate services is increasing and evolving among users. It would also include a detailed description of potential issues, risks and challenges that could arise during the course of work, along with demonstrated solutions successfully applied by the Bidder in past projects.</p> <p>b. Demonstrates a good knowledge and understanding of the need and utility of developing a user needs analysis framework that provides insights into climate information users are, what needs they have and how that can inform the development of climate services and products.. This would include a description of potential issues, risks and challenges that could arise during the course of work, along with demonstrated solutions successfully applied by the Bidder in past projects.</p> <p>c. Demonstrates basic knowledge and understanding of the need and utility of developing a user needs analysis framework that provides insights into climate information users are, what needs they have and how that can inform the development of climate services and products.. This would include a description of potential issues, risks and challenges that could arise during the course of work, along with solutions.</p> <p>d. Demonstrate no knowledge and unclear understanding of the need and utility of developing a user needs analysis framework that provides insights into climate information users are, what needs they have and how that can inform the development of climate services and products..</p>	<p>Max 10</p> <p>10</p> <p>7</p> <p>3</p> <p>0</p>	<p>Min 7</p>
PR2	<p><u>Approach and Methodology</u></p> <p>The Bidder's Approach and Methodology will be rated against the Evaluation Factors below and should be complete, feasible, responsive and</p>	<p>Max 30</p>	<p>Min 21</p>

	<p>consistent with the Department’s requirements as described in the SOW.</p> <ul style="list-style-type: none"> • Up to 5 points for a methodology to undertake a literature review to identify the lessons/best practices from existing fields and approaches to conducting user needs analysis. <ul style="list-style-type: none"> • Presents a detailed methodology to undertake the literature review (i.e. comprehensive review and identification of gaps within the academic and grey literature, and examination of related methodologies). • Presents a good methodology to undertake the literature review (i.e. review and identification of gaps within the academic and grey literature, and examination of related methodologies). • Presents a basic methodology to undertake the literature review (i.e. review and identification of gaps and examination of related methodologies). • Presents no methodology to undertake the literature review. • Up to 15 points for a methodology to develop and test a user needs analysis framework. <ul style="list-style-type: none"> • Presents a detailed methodology to develop a user needs analysis framework (i.e. to systematically characterize users and their needs, identification of potential criteria and archetypes to analyze users) and to test the framework (i.e. via consultation of informants and participants). • Presents a good methodology to develop a user needs analysis framework (i.e. to characterize users and their needs, identification of potential criteria and archetypes to analyze users) and to test the framework (i.e. via consultation of informants and participants) • Presents a basic methodology to develop a user needs analysis framework (i.e. to characterize users and their needs, identification of potential criteria and archetypes to analyze users) and to test the framework (i.e. via consultation) • Presents no methodology to identify tools, expertise and resources. • Up to 10 points for a project management approach, that considers diverse worldviews, values and knowledge systems, and which clearly describes how it has been successfully applied in past projects (including project delivery; structure and management of the Bidder’s team; means of controlling time, cost, quality and performance; measures to implement and maintain schedules, scope and resources). <ul style="list-style-type: none"> • Presents a detailed project management approach and clearly describes how it has been successfully applied in past projects. • Presents a good project delivery and management approach and describes how it has been successfully applied in past projects. • Presents a basic project delivery and management approach. • Presents no project delivery and management approach. 	<p>5</p> <p>4</p> <p>2</p> <p>0</p> <p>15</p> <p>10</p> <p>5</p> <p>0</p> <p>10</p> <p>7</p> <p>3</p> <p>0</p>	
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<p>PR3</p>	<p><u>Proposal Quality</u></p> <p>Up to ten (10) points will be awarded for presenting Proposals in a clear and logical fashion and in a manner which facilitates a clear and straightforward evaluation, as evidenced by the following:</p> <p>a. The proposal is very clear and well written with professional presentation, addresses all requirements of the Statement of Work, provides a detailed work-plan, including breakdown of hours by personnel, and adheres to the page limits.</p> <p>b. The proposal is mostly clear and well written, responds to the majority of the requirements of the Statement of Work, provides an adequate work-plan, and adheres to the page limits.</p> <p>c. The proposal is somewhat clear and adequately written, responds to some elements of the requirements of Statement of Work, provides a basic work-plan and exceeds the page limits.</p> <p>d. The proposal is not clear and difficult to understand, responds to minimal elements of the requirements of Statement of Work, provides no work-plan and exceeds the page limits.</p>	<p>Max 10</p> <p>10</p> <p>7</p> <p>3</p> <p>0</p>	<p>Min 7</p>
<p>PR4</p>	<p><u>Qualification and Experience of Company (Relevant Projects)</u></p> <p>The Bidder must provide three (3) examples of relevant (<i>as defined below</i>) projects conducted within the last five (5) years from date of bid closing (Project A or B can be referenced again as Project C). Each of the project summaries will be evaluated on the basis of its relevance and similarity to the Project's services, as defined by the SOW.</p> <ul style="list-style-type: none"> • A) At least one project summary must demonstrate direct applied experience pertaining to the use of climate information to support climate change impacts, risk or vulnerability assessment and/or adaptation planning for an organization within Canada. <ul style="list-style-type: none"> • A project summary that presents detailed and in-depth experience (based upon the extent of stakeholder engagement, level of analysis, and final product(s)) with the use of climate information to support climate change impacts, risk or vulnerability assessment and/or adaptation planning. • A project summary that presents moderate experience (based upon the extent of stakeholder engagement, level of analysis, and final product(s)) with the use of climate information to support climate change impacts, risk or vulnerability assessment and/or adaptation planning. • A project summary that presents a preliminary experience (based upon the extent of stakeholder engagement, level of analysis, and final product(s)) with the use of climate information to support climate 	<p>Max 30</p> <p>10</p> <p>7</p> <p>3</p>	<p>Min 21</p>

	<p>change impacts, risk or vulnerability assessment and/or adaptation planning.</p> <ul style="list-style-type: none"> • A project summary that presents no experience with the use of climate information to support climate change impacts, risk or vulnerability assessment and/or adaptation planning. <p>• B) At least one project summary must demonstrate direct applied experience with the conducting research and analysis of user needs and/or developing and testing frameworks to characterize and categorize user needs for an organization within Canada within the past 5 years.</p> <ul style="list-style-type: none"> • A project summary that presents detailed and in-depth experience (based upon extent of stakeholder engagement and identification and development of products) with the conducting of research and analysis of user needs and developing and testing frameworks. • A project summary that presents moderate experience (based upon extent of stakeholder engagement and identification and development of products) with the conducting of research and analysis of user needs and developing and testing frameworks. • A project summary that presents a preliminary experience (based upon extent of stakeholder engagement and identification and development of products) with the conducting of research and analysis of user needs and developing and testing frameworks. • A project summary that presents no experience with the conducting of research and analysis of user needs and developing and testing frameworks. <p>• C) At least one project summary must demonstrate the provision of services for a government institution and/ or large organization within Canada.</p> <ul style="list-style-type: none"> • A project summary that presents detailed and in-depth experience (based upon the extent of stakeholder engagement, level of analysis, and final product) with the provision of services for a government institution and/ or large organization within Canada. • A project summary that presents moderate experience (based upon the extent of stakeholder engagement, level of analysis, and final product) with the provision of services for a government institution and/ or large organization within Canada. • A project summary that presents a preliminary experience (based upon the extent of stakeholder engagement, level of analysis, and final product(s)) with the provision of services for a government institution and/ or large organization within Canada. • A project summary that presents no experience with the provision of services for a government institution and/ or large organization within Canada. <p><u>For each project cited, Bidders should submit:</u> Project Name, Client Organization, Project Start Date, Project End Date, the resource's role and responsibilities, the tasks undertaken and demonstrate that the project is similar in subject matter, complexity, size and scope. A reference name that can speak about the project and the Bidder's role must be provided, along with the contact information (email and phone number), organization</p>	<p>0</p> <p>10</p> <p>7</p> <p>3</p> <p>0</p> <p>10</p> <p>7</p> <p>3</p> <p>0</p>	
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	and position title.		
PR5	<p><u>Proposed Resource Team</u></p> <p>The proposed resource team will be evaluated on the extent and depth of relevant experience of the Project Manager and Project Team.</p> <p>The Bidder should demonstrated that the Project Manager has the experience and skill set to manage projects of this nature:</p> <p>a) How many projects has the Project Manager participated in the past five (5) years related to the i) use of climate information, ii) climate change risk assessment and/or adaptation planning, iii) user needs analysis, iv) the development/ testing of frameworks, and v) working directly with Indigenous communities and/or organizations.</p> <p>To be awarded points, a project description must contain at a minimum a summary with the following information:</p> <ul style="list-style-type: none"> • Project title, client name and industry sector; • Planned start and finish dates and actual start and finish dates; • Roles of the team members included in the proposal that were involved in the project; • Summary of the project; <p>2 points per project, up to 5 projects (<u>maximum of 10 points</u>).</p> <p>b) The Bidder should demonstrate that the project team as a whole has experience (via projects or research) in the following (<u>maximum of 10 points</u>).</p> <ul style="list-style-type: none"> • 1 point for each year of experience per team member in the use of climate information to support climate change risk assessment and/or adaptation planning. • 1 point for each year of experience per team member in user needs analysis. • 1 point for each year of experience per team member in the development and testing of frameworks. • 1 point for each year of experience per team member in the use of a variety of information sources to produce professional reports and accompanying graphics • 1 point for each year of experience per team member for working directly with Indigenous communities and/or organizations. 	Max 20	Min 14
	TOTAL SCORE	/70	

PART 5 - CERTIFICATIONS

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, 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 may render the bid non-responsive or constitute a default under the Contract.

1. Certifications Required Precedent to Contract Award

Bidders must submit the following duly completed certifications with their bid.

1.1 Integrity Provisions - Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

1.2 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 (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Employment and Social Development Canada (ESDC) - Labour's website.

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.

1.3 Federal Contractors Program for Employment Equity - Bid Certification

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 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.

2. Additional Certifications Required Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications 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 comply with the request of the Contracting Authority and to provide the certifications within the time frame provided will render the bid non-responsive.

2.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

2.2 Education and Experience

PWGSC SACC Manual clause A3010T 2010-08-16 Education and Experience

PART 7 - RESULTING CONTRACT

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

Title: Establishing a User Needs Analysis Frame Work for the Canadian Center for Climate Services

1. Statement of Work

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

2. Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the PWGSC *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.

2.1 General Conditions

2010B (2020-05-28), General Conditions - Professional Services (Medium Complexity), as modified below, apply to and form part of the Contract.

General conditions 2010B is modified as follows:

At Section 12 Transportation Costs

Delete: In its entirety

Insert: "Deleted"

At Section 13 Transportation Carriers" Liability

Delete: In its entirety.

Insert: "Deleted"

At Section 18, Confidentiality:

Delete: In its entirety

Insert: "Deleted"

Insert Subsection: "35 Liability"

"The Contractor is liable for any damage caused by the Contractor, its employees, subcontractors, or agents to Canada or any third party. Canada is liable for any damage caused by Canada, its employees or agents to the Contractor or any third party. The Parties agree that no limitation of liability or indemnity provision applies to the Contract unless it is specifically incorporated in full text in the Articles of Agreement. Damage includes any injury to persons (including injury resulting in death) or loss of or damage to property (including real property) caused as a result of or during the performance of the Contract."

A. For professional services requirements where the deliverables are copyrightable works:

Canada to own Intellectual Property rights in Copyright

At Section 19 Copyright

Delete: In its entirety

- Insert:**
1. In this section:
"Material" means anything that is created or developed by the Contractor as part of the Work under the Contract, and in which copyright subsists.
"Background Information" means all Intellectual Property that is not Foreground Information that is incorporated into the Work or necessary for the performance of the Work and that is proprietary to or the confidential information of the Contractor, its subcontractors or any other third party;
"Foreground Information" means all Intellectual Property first conceived, developed, produced or reduced to practice as part of the Work under the Contract;
 2. Material that is created or developed by the Contractor as part of the Work under the Contract belongs to Canada. The Contractor must incorporate the copyright symbol and either of the following notices, as appropriate: © Her Majesty the Queen in right of Canada (year) or © Sa Majesté la Reine du chef du Canada (année).
 3. At the request of the Contracting Authority, the Contractor must provide to Canada, at the completion of the Work or at such other time as the Contracting Authority may require, a written permanent waiver of moral rights as defined in the [Copyright Act](#), R.S., 1985, c. C-42, in a form acceptable to the Contracting Authority, from every author that contributed to the Work. If the Contractor is an author, the Contractor permanently waives the Contractor's moral rights.
 4. All Intellectual Property Rights in the Material belongs to Canada as soon as they come into existence. The Contractor has no right in or to any such Intellectual Property except any right that may be granted in writing by Canada.
 5. The Contractor also grants to Canada a non-exclusive, perpetual, irrevocable, worldwide, fully-paid and royalty-free license to use the Background Information to the extent that this information is required by Canada to exercise its rights to use the Material. This license cannot be restricted in any way by the Contractor providing any form of notice to the contrary, including the wording on any shrink-wrapped license attached to any deliverable.

- B. For standard service requirements (ex.: manual services, snow or garbage removal, cleaning, window washing, maintenance, etc.) the general conditions 2010 B General Conditions Professional Services (Medium Complexity), must be modified as follows:**

At Section 06 Subcontracts

Delete: paragraphs 1, 2, and 3 in their entirety.

Insert: "The Contractor may subcontract the supply of goods or services that are customarily subcontracted by the Contractor. Subcontracting does not relieve the Contractor from any of its obligations under the Contract or impose any liability upon Canada to a subcontractor. In any subcontract, the Contractor agrees to bind the subcontractor by the same conditions by which the Contractor is bound under the Contract, unless the Contracting Authority agrees otherwise, with the exception of requirements under the Federal Contractors Program for employment equity which only apply to the Contractor."

At Section 19 Copyright

Delete: In its entirety

Insert: "Deleted"

3. Security Requirement

3.1 There is no security requirement applicable to this Contract.

4. Term of Contract

4.1 Period of the Contract

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

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Francisco Santamaria
Title: Procurement Officer
Environment Canada
Procurement and Contracting Division
Address: 200 Scare-Coeur Blvd

Telephone: 819-938-3193
E-mail address: Francisco.Santamaria@Canada.ca

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

5.2 Technical Authority

The Technical Authority for the Contract is: *(at contract award)*

Name:
Title:
Organization:
Address:

Telephone:
E-mail address:

The Technical Authority named above 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 Technical Authority, however the Technical Authority has no authority to

authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6. 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. Payment

7.1 Basis of Payment

The Contractor will be paid for the work performed in accordance with the Basis of payment at annex B, a firm price of \$ _____ (*insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

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

7.2 Limitation of Expenditure

- (a) Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and the Applicable Taxes are extra.
- (b) No increase in the total liability of Canada or in the price of the Work 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 approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - (i) when it is 75 percent committed, or
 - (ii) four (4) months before the contract expiry date, or
 - (iii) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,whichever comes first.
- (c) 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.

7.3 PWGSC SACC Manual Clauses

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

8. Invoicing Instructions

8.1 Milestone Payment

8.1.1 Canada will make milestone payments in accordance with the Schedule of Milestones detailed in Annex B of the Contract and the payment provisions of the Contract, up to 100 percent of the amount claimed and approved by Canada if:

- (a) an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada;
- (c) all work associated with the milestone and as applicable any deliverable required have been completed and accepted by Canada.

9. Certifications

9.1 Compliance

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

10. Applicable Laws

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

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) 2010B General Conditions - Professional Services (Medium Complexity) [\(2020-05-28\)](#) as modified;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;

ANNEX A STATEMENT OF WORK

Title:

Establishing a User Needs Analysis Framework for the Canadian Center for Climate Services

1. Scope

The impacts of climate change are becoming increasingly evident and significant across Canada. The literature indicates that the climate will continue to change, and related impacts will increase and intensify. As an example, climate projections indicate that we can expect longer periods of extreme heat. Longer and hotter heatwaves due to climate change, coupled with an aging population, and increasing urbanization are trends that could see an increase in the number of deaths from heat waves. Canadians understand that it is prudent to prepare for these, and other, climate-related impacts but need the tools and support to integrate climate information into decision-making.

To help with this, the Government of Canada launched the Canadian Centre for Climate Services (CCCS) in 2018, within Environment and Climate Change Canada (ECCC), so that Canadians have access to the information and support they need to understand and plan for climate impacts. The CCCS works with provinces, territories, and other climate services providers to provide access to climate data, training and support on the use of climate information, and opportunities to collaboratively develop new data products. The CCCS also address common barriers to using climate information in decisions - like lack of access to reliable information and data in usable formats, or the knowledge of how to find and use the information.

The information that CCCS provides can be used to help understand and plan for climatic changes, reduce risks, and build climate resiliency. The Centre is therefore an important part of Canada's efforts to combat climate change and increase resiliency to its impacts under the Pan-Canadian Framework on Clean Growth and Climate Change, Canada's climate action plan. Providing climate services includes several activities, such as

- enabling easy access to reliable historic and future climate data and information to increase understanding of climate change and its impacts;
- translating climate-related science into information and tools that are clear, meaningful and easy to apply to a decision;
- collaborating with experts and users to develop new products that respond to user needs; and
- providing training and guidance on how to incorporate climate information into decisions.

Nationally, the CCCS enhances access to climate data and information through its recently launched website (www.canada.ca/climate-services). Canadians can access climate experts and assistance through the CCCS Support Desk, to help understand and use climate information in decision-making. The CCCS provides national leadership and collaborates with other regional climate consortia to provide coordinated climate services across Canada. To ensure that products and services from the CCCS and regional consortia are user driven, regular and ongoing engagement with various users of different types, across sectors and geographies is of high importance.

The CCCS is advancing its understanding of climate information and data users and their needs, to further provide impactful and tailored climate services and products and to support ongoing evaluation of the success of its services.

The characterization of climate information users has proven challenging, across Canadian climate services providers, as the demand for services is increasing and evolving. For example, the three-tiered characterization of users as ‘beginner – intermediate – advanced’ has become an oversimplification and inaccurate manner to categorize user needs. Additionally, this three-tiered characterization often confounds whether the three levels refer to proficiency with climate information (as used in training subgroups) or why the data is needed (what will be used for) and how sophisticated/technical their desired information is (e.g. as used in Ouranos Guidebook 2016¹). Another approach has been to characterize user needs by sectors, but this is only partially helpful as similar (or identical) climate information is often provided to users from different sectors.

As a result, the CCCS, and its collaborators, aim to define a new user needs analysis framework that would systematically understand who the current and future users are, their diverse needs, and how climate services and products can be tailored to these needs. In particular, the CCCS is looking to adopt lessons from agile methodology and user psychographics to characterize users and develop a framework that considers users’ motivations to use climate information, the intended use or application of that information in decisions or processes and users’ values that inform their overarching goals.

2. Objective

The Canadian Center for Climate Services is seeking professional services to assist with the development of a systematic user needs analysis framework that supports rigorous insights into who the users are and what needs they have. This framework is expected to characterize users and identify their shared characteristics in the form of archetypes to support the scaling up of climate services to more effectively deliver tailored services and evaluate their impact/ success.

The services requested under this contract have the following objectives:

1. Research the lessons and best practices from relevant fields and approaches to conducting user needs analysis (e.g. Agile, Psychographics and/ or other methodologies);
2. Develop a framework to characterize and categorise users and their needs
3. Test the framework to validate if it works and ensure it aligns with CCCS’ objectives.

The CCCS understands that certain user groups can be characterized with the framework to be developed, yet some groups may still benefit from climate services tailored to their individual needs.

3. Terminology

The following list of definitions is not exhaustive, but intended to provide some clarity of understanding of the key terms used with the Statement of Work:

¹ Ouranos. 2016. [A Guidebook on Climate Scenarios Using Climate Information to Guide Adaptation Research and Decisions.](#)

Term/Acronym	Definition
Agile methodology	A methodology, which supports an iterative structure, adapting to changes and responding to feedback to provide constant results ² .
User psychographics	User psychographics include knowledge about the grouping of individuals dependent on their mentalities, earnings, premiums and other mental criteria. ³
Canadian Centre for Climate Services	<p>The Canadian Centre for Climate Services is a dedicated multi-disciplinary team with expertise across a broad range of climate-related disciplines. The CCCS works with partners and stakeholders to support the implementation of the Pan-Canadian Framework on Clean Growth and Climate Change. The CCCS provides Canadians with information and support to consider climate change in their decisions by:</p> <ul style="list-style-type: none"> • delivering climate services driven by user needs; • providing access to climate information; • building local capacity; and • offering training and support.
Climate Services	<p>Climate services are actions associated with providing, translating, and transforming climate information and variables to help users' understand climate change and its impacts, to support adaptation planning and decision-making.</p> <p>Climate services are developed based on the needs of users. Climate services can help individuals better understand climate change vulnerabilities, risks, and opportunities. They can support adaptation planning and decision-making to increase resiliency to the expected impacts of current and future climate change.</p> <p>A climate service provider supplies climate information to users. The roles of these organizations include providing historical and future climate data, running climate simulations, and tailoring their outputs to suit the needs of individual users and/or user groups.</p>
Environment & Climate Change Canada	Location (the Client): 200 Boulevard Sacre Coeur, Gatineau, Quebec
Users	Generally, “[User] is a broad category that includes peoples or organizations that use the results of research to better inform decisions and influence outcomes. Users are the ones with whom researchers must engage to produce useful information. Users may be individuals, program managers, science translators, educators, policy makers or elected officials.” ⁴ In the context of climate services, users can refer to all people, regardless of their sectoral, academic, or professional affiliation, who have interacted with climate information, ranging from using broad information or applying detailed climate variables data into their work ⁵ .

² SimplLearn. [What is Agile: Understanding Agile Methodology and Its Types](#). June 1, 2020.

³ Ux Planet. [Psychographics: A qualitative measure for user's psychological Attributes](#). Feb 12, 2019.

⁴ McNie, E. C., Parris, A., & Sarewitz, D. (2016). Improving the public value of science: A typology to inform discussion, design and implementation of research. *Research Policy*, 45(4), 884-895.

⁵ Skelton, M.; Fischer, A.M.; Liniger, M.A. and Bresch, D.N. 2019. Who is 'the user' of climate services? Unpacking the use of national climate scenarios in Switzerland beyond sectors, numeracy and the research–practice binary. *Climate Services* (15).

4. Description of Services (Requirements)

The following outlines the requirements of the Contract, for which specific tasks are identified in Section 5.0, and deliverables identified in Section 6.0. All the work is expected to be conducted on the contractor's premises and the Contractor is to meet regularly with CCCS to ensure the Contract will be delivered on time, on budget, and within reasonable expectations at the Centre's discretion.

- 1) Participate to meetings
- 2) Research the lessons/best practices from existing fields and approaches to conducting user needs analysis (i.e. agile and psychographics methodologies) (November 15, 2020).
- 3) Develop a framework to characterize and categorise diverse users and their needs (December 18, 2020).
- 4) Test the framework to validate if it works and to ensure it aligns with CCCS' objectives (by March 31, 2021).

5. Tasks

5.1 Project Management

- (a) The Contractor will present a detailed Work Plan outlining the approach, timelines and time task matrix to undertake the work, including methods to review the literature, develop and test the framework.
- (b) The Contractor will participate in a project kick-off meeting with CCCS to discuss the Work Plan.
- (c) The Contractor will hold regular progress meetings with CCCS, including to:
 - i. Meet weekly via teleconference, or media platform, until the Contract is complete;
 - ii. Provide an update on progress made and work remaining in achieving all milestones, and an assessment of any challenges preventing any milestones from being achieved on time, with any relevant documentation;
 - iii. Provide an assessment of whether the Contract is on budget, and provide details on any issues that may prevent the Contract from being completed on Budget, with any relevant documentation; and,
 - iv. At the CCCS' discretion, adjust milestone dates or requirements based on these progress discussions.

5.2 Literature Review

- (a) The Contractor will review academic and grey literature review to identify and document the lessons/best practices from existing fields and approaches to conducting user needs analysis, such as, agile and psychographics methodologies.
- (b) Based on these findings, the Contractor will provide recommendations on how the CCCS could conduct user needs analysis.

- (c) The Contractor will summarize findings, observations, and learnings to inform the development of a user needs analysis framework in a report (report #1).

5.3 Develop a User Needs Analysis Framework

- (a) Based on the findings of **Activity 5.2**, the Contractor will develop a framework for the CCCS to systematically characterize users and their needs. The framework will contain:
1. **A set of criteria** (2 to 3) by which diverse users and their needs can be characterized and differentiated:
 - This should include the following elements, and others that the literature suggests are insightful:
 - a. **The ‘why’**: intentions to use climate information or why the information is sought (*e.g. for general purposes such as intentions to prepare for and avoid specific risks, communicate and raise awareness about the need for climate adaptation, new policy requirements OR more specific purposes such as the design of manufacturing processes, infrastructure design and/or supply chain analysis*);
 - b. **The ‘how’**: in what way will the climate information/products be used (*e.g. on a spectrum from high level broad information to integrating detailed multi-variable data sets into other existing models*); and
 - c. **The ‘motivation’**: Organizational and/or individual values and principles that inform goals (*e.g. long-term resiliency, corporate viability, one-time exercise*).
 2. A **set of user archetypes** that align with the defined criteria, to categorize the users.
- (b) The Contractor will also need to account for the following elements as part of their analysis in developing the framework, in particular:
- Consider a combination of individual and organizational characteristics as part of the framework, including their current capacity to use climate information;
 - the ways in which a profession/occupation may shape user needs or characterize a user group/organization;
 - consider regional or geographic differences and if/how those influence needs;
 - consider and integrate diverse worldviews, values and knowledge systems, including Indigenous knowledge, traditional and local knowledge, and how they shape user needs.
- (c) Once completed, the Contractor must present the framework, which includes the criteria (2-3) and the user archetypes in a report (report #2). This draft report must also include observations and recommendations on next steps to test the framework.

5.4 Test the User Needs Analysis Framework

(a) Once the user needs analysis framework has been defined, the Contractor will test it and refine it in **two phases**, to determine if the approach works and to ensure it aligns with CCCS objectives:

1. **Phase 1:** The contractor will test the framework by interviewing CCCS's regional collaborators (up to 15 individuals) as to their perspective on the framework and gather their feedback. For this, the contractor will develop a series of interview questions and a list of regional collaborator contact information will be provided by the CCCS.
 - a. Feedback received at this phase will be considered and compiled by the Contractor
 - b. Feedback will be reviewed by the CCCS and integrated by the contractor before Phase 2.

2. **Phase 2:** The contractor will test the framework by surveying a list of users (approximately 60). The contractor will develop the survey, orchestrate its distribution and compile results. The CCCS will assist in identifying users to interview.
 - a. Results from the survey will be analyzed and compiled by the Contractor.
 - b. The Contractor will provide key observations and summarize the results from the two phases in a report (report #3). The report will provide recommendations on how to address any gaps between the proposed framework and the results of the testing.

5.5 Final Report and Supporting Graphics

- (a) The Contractor will submit a Final Report, which presents the user needs analysis framework integrating all the feedback received from the CCCS, as a result of the reports #1, 2 and 3.
- (b) The Contractor will also develop related graphic materials that are public facing and demonstrates how users are considered.
- (c) Both the framework and graphic materials will be presented to CCCS.

6. Deliverables and Acceptance Requirements

The following is an approximate schedule for the activities/tasks and associated deliverables presented above.

Task	Deliverable	Estimated Due Date (On or before)
5.1. Project management	Project approach and plan	By contract initiation.
5.2. Literature review	Report #1	<i>Specific dates to be determined once the contract starts</i>
5.3. Develop the framework	Report #2	<i>Specific dates to be determined once the contract startss</i>

Task	Deliverable	Estimated Due Date (On or before)
5.4. Test the framework	Report #3	<i>Specific dates to be determined once the contract startss</i>
5.5. Reports and Associated Documents	Final report (with literature review, framework, graphics and testing findings) and presentation	By March 31, 2021

7. Support by the Canadian Centre for Climate Services

The CCCS will:

- Provide all relevant information the Centre has collected on user needs analysis, to the Contractor, within five business days of the awarding of the Contract. This information will not represent a complete basis for research/analysis but rather a start to build out (Section 15, presents key documents collected to date).
- Review all materials provided by the Contractor where the CCCS' input is sought, or where input is identified in Section 5.0 of this document.
- After conversation with the Contractor on any needs to change the planned schedule for work in the Contract, advise the Contractor of reasonable changes to the planned schedule for work in the Contract.
- Provide the Contractor with assistance and resources necessary for the completion of the Contract when those are held only by the CCCS (i.e. scheduling meetings with key informants and participants or climate information that aren't publicly available but are relevant to the Contract).
- Provide teleconference or web-platform information for discussions with the Contractor, when necessary.

8. Official Language

Deliverables are to be submitted by the contractor in the language of their choice in French or in English.

9. Work Location

All work will be performed at the Contractor's place of business. Meetings with CCCS will be conducted via telephone or platforms such as MS Teams or Web-Ex.

10. List of Potential Documents to Review

CCCS can provide the following documents for consideration by the Contractor in the Literature Review.

1. Alexander, M., & Dessai, S. (2019). What can climate services learn from the broader services literature?. *Climatic Change*, 157(1), 133-149.
2. Baker, Z., Ekstrom, J. A., Meagher, K. D., Preston, B. L., & Bedsworth, L. (2020). The social structure of climate change research and practitioner engagement: Evidence from California. *Global Environmental Change*, 63, 102074.
3. Brasseur, G. P., & Gallardo, L. (2016). Climate services: Lessons learned and future prospects. *Earth's Future*, 4(3), 79-89.
4. Daly, M., & Dilling, L. (2019). The politics of “usable” knowledge: examining the development of climate services in Tanzania. *Climatic Change*, 157(1), 61-80.
5. Flagg, J. A., & Kirchhoff, C. J. (2018). Context matters: Context-related drivers of and barriers to climate information use. *Climate Risk Management*, 20, 1-10.
6. Lemos, M. C., Arnott, J. C., Ardoin, N. M., Baja, K., Bednarek, A. T., Dewulf, A., ... & Mach, K. J. (2018). To co-produce or not to co-produce. *Nature Sustainability*, 1(12), 722-724.
7. Lemos, M. C., Wolske, K. S., Rasmussen, L. V., Arnott, J. C., Kalcic, M., & Kirchhoff, C. J. (2019). The Closer, the Better? Untangling Scientist–Practitioner Engagement, Interaction, and Knowledge Use. *Weather, Climate, and Society*, 11(3), 535-548.
8. Mach, K. J., Lemos, M. C., Meadow, A. M., Wyborn, C., Klenk, N., Arnott, J. C., ... & Stults, M. (2020). Actionable knowledge and the art of engagement. *Current Opinion in Environmental Sustainability*, 42, 30-37.
9. McNie, E. C., Parris, A., & Sarewitz, D. (2016). Improving the public value of science: A typology to inform discussion, design and implementation of research. *Research Policy*, 45(4), 884-895.
10. Moser, S. C. (2016). Can science on transformation transform science? Lessons from co-design. *Current Opinion in Environmental Sustainability*, 20, 106-115.
11. Moser, S. C. (2016). Reflections on climate change communication research and practice in the second decade of the 21st century: what more is there to say?. *Wiley Interdisciplinary Reviews: Climate Change*, 7(3), 345-369.
12. Prokopy, L. S., Carlton, J. S., Haigh, T., Lemos, M. C., Mase, A. S., & Widhalm, M. (2017). Useful to Usable: Developing usable climate science for agriculture. *Climate Risk Management*, 15, 1-7
13. Rasmussen, L. V., Kirchhoff, C. J., & Lemos, M. C. (2017). Adaptation by stealth: climate information use in the Great Lakes region across scales. *Climatic change*, 140(3-4), 451-465.
14. Skelton, M., Fischer, A. M., Liniger, M. A., & Bresch, D. N. (2019). Who is ‘the user’ of climate services? Unpacking the use of national climate scenarios in Switzerland beyond sectors, numeracy and the research–practice binary. *Climate Services*, 15, 100113.
15. Simpson, C. F., Dilling, L., Dow, K., Lackstrom, K. J., Lemos, M. C., & Riley, R. E. (2016). Assessing needs and decision contexts: RISA approaches to engagement research. *Climate in context: Science and society partnering for adaptation*, 3-25.

16. Vogel, J., McNie, E., & Behar, D. (2016). Co-producing actionable science for water utilities. *Climate Services*, 2, 30-40.
17. Wall, T. U., McNie, E., & Garfin, G. M. (2017). Use-inspired science: making science usable by and useful to decision makers. *Frontiers in Ecology and the Environment*, 15(10), 551-559.
18. Vaughan, C., Muth, M. F., & Brown, D. P. (2019). Evaluation of regional climate services: Learning from seasonal-scale examples across the Americas. *Climate Services*, 15, 100104.

**ANNEX B_
BASIS OF PAYMENT
(at contract award)**

Deliverable	Schedule of payments	Total cost
Task 5.1	Specific dates to be determined once the contract starts	
Task 5.2	Specific dates to be determined once the contract starts	
Task 5.3 – 5.5	Specific dates to be determined once the contract starts	

Task	Deliverable	Estimated Due Date (On or before)	Total Cost
5.1. Project management	Project approach and plan	By contract initiation	
5.2. Literature review	Report #1	Specific dates to be determined once the contract starts	
5.3. Develop the framework	Report #2	Specific dates to be determined once the contract starts	
5.4. Test the framework	Report #3	Specific dates to be determined once the contract starts	
5.5. Reports and Associated Documents	Final report (with literature review, framework, graphics and testing findings) and presentation	By March 31, 2021	