



Return Bids to:

Natural Resources Canada
Procurement Services Unit
Valerie.holmes@canada.ca

Request for Proposal (RFP)

Proposal To: Natural Resources 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.

Comments – Commentaires

Bidders must submit all proposals electronically. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation. Bidders are asked to contact the Contracting Authority to confirm receipt of their bid. NRCan encourages bidders to submit all bids earlier than the closing time in order to ensure sufficient time to be received in NRCan’s server.

Issuing Office

Finance and Procurement Management Branch
Natural Resources Canada
Procurement Services Unit
580 rue Booth Street
Ottawa, Ontario
K1A 0E4

Title – Sujet Supporting Climate Change Adaptation Implementation through Virtual Collaboration	
Solicitation No. – No de l’invitation NRCan-5000057218	Date January 22, 2021
Requisition Reference No. - N° de la demande 163199	
Solicitation Closes – L’invitation prend fin at – à 02:00 PM (Eastern Standard Time (EST)) on – le February 05, 2021	
Address Enquiries to: - Adresse toutes questions à: Valerie.holmes@canada.ca	
Telephone No. – No de telephone 613-864-8017	Fax No. – No. de Fax _____
Destination – of Goods and Services: Destination – des biens et services: Natural Resources Canada 588 Booth Street Ottawa, Ontario K1A 0Y7	
Security – Sécurité There are no security requirements associated with this requirement.	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l’entrepreneur _____	
Telephone No.:- No. de téléphone: Facsimile No.:- No. de télécopieur: Email – Courriel :	
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)	
_____ Signature	_____ Date



TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION.....5

1.1 Introduction5

1.2 Summary5

1.2.2 Security Requirements5

1.3 Debriefings.....5

PART 2 - BIDDER INSTRUCTIONS6

2.1 Standard Instructions, Clauses and Conditions6

2.2 Submission of Bids6

2.3 Enquiries - Bid Solicitation7

2.4 Applicable Laws.....7

2.5 Improvement of Requirement During Solicitation Period.....7

2.6 Basis for Canada's Ownership of Intellectual Property8

PART 3 - BID PREPARATION INSTRUCTIONS9

3.1 Bid Preparation Instructions9

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION11

4.1 Evaluation Procedures11

4.1.1 Technical Evaluation.....11

4.2 Basis of Selection11

4.2.1 Highest Combined Rating of Technical Merit and Price11

Attachment 1 to Part 4 – Evaluation Criteria13

1. Mandatory Requirements13

2. Point Rated Technical Requirements.....14

Attachment 2 to Part 4 – Financial Proposal Form17

1. Firm Price – Milestone Payments17

PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION19

5.1 Certifications Required with the Bid19

5.1.1 Integrity Provisions - Declaration of Convicted Offences19

5.2 Certifications Precedent to Contract Award and Additional Information19

5.2.1 Integrity Provisions – Required Documentation.....19

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification.....20

5.2.3 Status and Availability of Resources20

5.2.4 Education and Experience21

5.2.5 Former Public Servant21

5.2.6 Aboriginal Designation23

PART 6 - SECURITY AND OTHER REQUIREMENTS24

6.1 Security Requirements.....24

6.2 Insurance Requirements24

PART 7 - RESULTING CONTRACT CLAUSES.....25

7.1 Statement of Work OR Requirement.....25

7.2 Standard Clauses and Conditions.....25

7.2.1 General Conditions.....25

7.2.2 Supplemental General Conditions.....25

7.3 Dispute Resolution.....25

7.4 Security Requirements.....26

7.5 Term of Contract.....26

7.5.1 Period of the Contract.....26



7.6	Comprehensive Land Claims Agreements (CLCAs).....	26
7.7	Authorities	26
7.7.1	Contracting Authority.....	26
7.7.2	Project Authority.....	27
7.7.3	Contractor's Representative.....	27
7.8	Proactive Disclosure of Contracts with Former Public Servants	27
7.9	Payment.....	27
7.9.1	Basis of Payment – Firm Price, Firm Unit Price(S) or Firm Lot Price(s)	27
7.9.2	Method of Payment	28
7.10	Invoicing Instructions	28
7.11	Certifications and Additional Information	28
7.11.1	Compliance.....	28
7.12	Applicable Laws.....	28
7.13	Foreign Nationals (Canadian Contractor OR Foreign Contractor)	29
7.14	Insurance.....	29
7.15	Contract Administration.....	29
ANNEX “A” - STATEMENT OF WORK.....		30
SW1	Title	30
SW2	Overview	30
SW3	Objectives.....	31
SW4	Project Requirements.....	31
SW4.1	Tasks.....	31
SW4.2	Deliverables.....	33
SW4.3	Milestones and Schedule	34
SW4.4	Reporting Requirements	35
SW5	Other Terms and Conditions of SOW	35
SW5.1	Contractor’s Obligations.....	35
SW5.2	NRCan’s Obligations	36
SW5.3	Location of Work, Work Site and Delivery Point	36
SW5.4	Language of Work	36
ANNEX “B” - BASIS OF PAYMENT.....		37



The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP. Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.



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 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:

Annex "A" - the Statement of Work

Annex "B" - the Basis of Payment

The Attachments include:

Attachment 1 to Part 4 - the Evaluation Criteria

Attachment 2 to Part 4 - the Financial Proposal Form.

1.2 Summary

By means of the RFP, Natural Resources Canada (NRCan) is seeking proposals from bidders to conduct a review and analysis of best practices for designing and implementing Virtual Spaces for collaboration and action on adaptation to climate change.

The contract will start on date of award of the contract until **March 31, 2021**.

1.2.1 Security Requirements

There is no security requirement associated with this bid solicitation or any 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 will be done in writing, by email.



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 (2020-05-28) - Standard Instructions - Goods or Services - Competitive Requirements**, are incorporated by reference into and form part of the bid solicitation with the modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

In the complete text content (except Section 3)

Delete: Public Works and Government Services Canada

Insert: Natural Resources Canada.

Delete: PWGSC

Insert: NRCan

Section 2 – Procurement Business Number:

Delete: “Suppliers are required to”

Insert: “It is suggested that suppliers”

Subsection 5.4 of Section 5 – Submission of Bids:

Delete: 60 days

Insert: 120 days

Subsection 1 of (Facsimile) of Section 8:

Delete: entirely

Subsection 2 (epost Connect) of Section 8:

Delete: entirely

Under Subsection 2 of Section 20 – Further Information:

Not applicable

2.2 Submission of Bids

Bidders must submit all proposals electronically. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation. Bidders are asked to contact the Contracting Authority to confirm receipt of their bid. NRCan encourages bidders to submit all bids earlier than the closing time in order to ensure sufficient time to be received in NRCan’s server.

It is the Bidders responsibility to ensure that proposals are sent to the following e-mail address, by the time and date indicated on page 1 of this RFP document.



- Send proposals to this email address: Valerie.holmes@canada.ca
- Contact the Contracting Authority **Valerie Holmes** at **613-864-8017** by either telephone call or email for receipt of bid confirmation.

IMPORTANT

It is requested that you write the following information in “Subject” of the e-mail:

NRCan-5000057218 – Supporting Climate Change Adaptation Implementation through Virtual Collaboration

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

NRCan will not assume responsibility for proposals directed to any other location.

The onus is on the Bidder to ensure that the proposal is submitted correctly to the above address. Not complying with the above instructions may result in NRCan’s inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **five (5)** 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.

2.4 Applicable Laws

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

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.

2.5 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in



the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least **five (5)** calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.6 Basis for Canada's Ownership of Intellectual Property

Natural Resources 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 reasons: as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)

Where the main purpose of the Crown Procurement Contract, or the deliverables contracted for, is:

- To deliver a not-yet fully developed component or subsystem that will be incorporated into a complete system at a later date, as a prerequisite to the planned transfer of the complete system to the private sector, through licensing or assignment of ownership, for the purposes of Commercial Exploitation.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Due to the outbreak of COVID-19, NRCan is foregoing the need to have people outside delivering packages to our Bid Receipt Unit. Therefore, given this pandemic, you must submit your bids as follows:

Your Company Name – Section I/II/III – Technical/Financial Proposal/Certifications

Section I: Technical Bid: One (1) PDF copy - labelled as per the above

Section II: Financial Bid: One (1) PDF copy – labelled as per the above

Section III: Certifications: One (1) PDF copy - labelled as per the above

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

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, Bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing and printing double sided/duplex.

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 and describe their approach 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

Bidders must submit their financial bid in accordance with the Financial Proposal Form in Appendix 2 to Part 4. The total amount of Applicable Taxes must be shown separately.

Exchange Rate Fluctuation

C3011T (2013-11-16), 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 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 Appendix 1 to Part 4 – Evaluation Criteria.

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit and Price

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 of **forty-eight (48)** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 80 points.
2. Bids not meeting a) or b) or c) 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. Natural Resources will conduct a financial evaluation against all technically responsive bids by comparing the relative “Total Bid Price” (see **Attachment 2 to Part 4**) for each Category and Level of Expertise.

Only those responsive proposals proposing a total contract value that falls above the “Median” minus 10% and below the “Median” plus 20% will be considered financially responsive and subject to further consideration in the bid evaluation process. The “Median” will be calculated based on the total contract value submitted by all responsive bidders. A “Median” is the middle financial proposal in a set of financial proposals whereby half the financial proposals are greater and half are lower. For example in the following set of numbers: 100, 150, 200, 400, 900, the median would be 200, while the median minus 10% would be 180, the median plus 20% would be 240.



Responsive proposals have submitted financial proposals $\geq 10\%$ below the median price of the responsive proposals and $\leq 20\%$ over the median price of the responsive proposals, all other bids will be declared non-responsive. Only those bids within that range will be given further consideration. Once the compliant bids have been determined, the Highest Combined Rating of 70% Technical Merit and 30% Price will be applied.

Example of 70% Technical Merit and 30% Price Determination				
	Bidder 1	Bidder 2	Bidder 3	Bidder 4
Technical Points Achieved by Bidder (out of 80 available points)	70/80	75/80	55/80	65/80
Price Quoted by Bidder	\$85,000	\$80,000	\$50,000	\$75,000

Note that the median price is \$77,500. The median price -10% would be \$69,750.00 and +20% would be \$93,000.00. The financial proposal of Bidder 3 would be considered non-compliant, since it is below the **median minus 10%**.

The final evaluation would then include an evaluation of the proposals of only the remaining responsive bidders, depicted in the following table:

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)			
Bidder	Bidder 1	Bidder 2	Bidder 4
Overall Score for All the Point Rated Technical Criteria (out of 80 available points)	70/80	75/80	65/80
Bid Evaluated Price	C\$85,000	C\$80,000	C\$75,000
Calculations	Technical Merit Score x 70	Pricing Score x 30	Combined Rating
Bidder 1	$70/80 \times 70 = 61.25$	$75/85 \times 30 = 26.47$	87.72
Bidder 2	$75/80 \times 70 = 65.53$	$75/80 \times 30 = 28.13$	93.66
Bidder 4	$65/80 \times 70 = 56.88$	$75/75 \times 30 = 30.00$	86.88

In this scenario, bidder #2 would be considered for contract award.



ATTACHMENT 1 TO PART 4 – EVALUATION CRITERIA

1. Mandatory Requirements

Bidders are to ensure they clearly demonstrate the technical evaluation criteria within their proposal. It is recommended that the Bidders identify in their proposal what sections are related to which mandatory technical criteria (i.e. from resume – Project 1 (**M1**)). Simply cutting and pasting will not be permitted.

Item	Mandatory Technical Criteria	Compliant	Bidder’s Response: indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers
M1	<p>Resource Requirements:</p> <p>The Bidder MUST propose by name, all of the resource(s) designated for the project and their proposed role (e.g. Project Leader, researcher, interviewer).</p> <p>Note: For each named resource, the Bidder must provide a detailed curriculum vitae (CV). CVs must include a description of the proposed resource’s qualifications, work experience and skills as it relates to the provision of the services described in the Statement of Work, and a list of relevant publications and projects.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2	<p>Language Requirement:</p> <p>If the proposed resource(s) is unilingual, the Bidder MUST describe how the resource(s) will review and incorporate information in both official languages.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M3	<p>Project Team Knowledge:</p> <p>The Bidder MUST include a short overview report (max 2 pages*) describing the use and efficacy of virtual spaces / online collaboration for action on climate change and/or climate change adaptation in Canada and internationally.</p> <p>*NRCan reserves the right to review more than the first two pages of the overview report should it exceed 2 pages.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M4	<p>Work Plan and Approach:</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Technical Criteria	Compliant	Bidder's Response: indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers
	The Bidder MUST include a description of the project approach including proposed scope and a work plan describing activities, deliverables, and timeline. The proposed scope of work must identify targeted topics and potential sources of information.		

2. Point Rated Technical Requirements

Item	Point Rated Technical Criteria	Points Breakdown	Max Points	Bidder's Response: indicate where in the bid the reference material can be found, including the title of the document, page numbers and project numbers
R1	Project Leader The Project Leader has experience leading projects where they worked on the development, implementation, or maintenance of 'virtual collaboration spaces,' 'knowledge exchange platforms,' or other relevant virtual fora.	>10 years of experience: 20 points >8 – 10 years of experience: 14 points >5-8 years of experience: 8 points 1-5 years of experience: 3 points	20	
R2	Project Leader The Project Leader has experience leading projects where they worked on climate change, with preference given to climate change adaptation and resilience, but may also include other climate-change experience such as mitigation, disaster risk reduction, or a related field.	>10 years of experience: 15 points 5-10 years of experience: 8 points 1-4 years of experience: 5 points Additional points: Specific experience on climate change adaptation +2 points.	15 +2	
R3	Project Team Experience and Knowledge Based on the requirements of M3 and M1 (CV(s) for named resources), the experience and knowledge for the Project Team will be evaluated and points will be awarded for: a) Short Overview Report and team CV(s) demonstrate that the team has strong knowledge and extensive experience in delivering high quality	a) 20 points b) 15 points c) 10 points d) 0 points	20	



Item	Point Rated Technical Criteria	Points Breakdown	Max Points	Bidder's Response: indicate where in the bid the reference material can be found, including the title of the document, page numbers and project numbers
	<p>projects and reports related to the services described in the Statement of Work.</p> <p>b) Short Overview Report and team CV(s) demonstrate that the team has more than adequate knowledge and experience in delivering good quality projects and reports related to the services described in the Statement of Work.</p> <p>c) Short Overview Report and team CV(s) demonstrate that the bidder's team has adequate knowledge and experience in delivering projects and reports related to the services described in the Statement of Work.</p> <p>d) Short Overview Report and team CV(s) fail to demonstrate that the team has adequate knowledge and experience to accomplish the required project tasks related to the services described in the Statement of Work.</p>			
R4	<p>Project Work Plan and Approach Further to the requirement of M4, the submitted work plan and approach will be evaluated and points will be awarded for:</p> <p>a) The project scope, work plan, deliverables, and timeline demonstrate that the team has excellent knowledge and should ensure highly effective performance on the delivery of services described in the Statement of Work.</p> <p>b) The project scope, work plan, deliverables, and timeline demonstrate that the team has very good knowledge and should</p>	<p>a) 20 points b) 15 points c) 10 points d) 0 points</p>	20	



Item	Point Rated Technical Criteria	Points Breakdown	Max Points	Bidder's Response: indicate where in the bid the reference material can be found, including the title of the document, page numbers and project numbers
	<p>ensure effective performance on the delivery of services described in the Statement of Work.</p> <p>c) The project scope, work plan, deliverables, and timeline demonstrate that the team has good knowledge and should ensure adequate performance on the delivery of services described in the Statement of Work.</p> <p>d) The project scope, work plan, deliverables, and timeline demonstrate that the team has unsatisfactory knowledge and insufficient ability to deliver the services described in the Statement of Work.</p>			
R5	<p>Quality of Proposal The overall quality of the proposal will be assessed and 1 point will be awarded for each of the following categories, if met:</p> <p>a) Concise b) Clear, plain language c) Well organized d) Free of spelling and grammar mistakes</p>	<p>5 points</p> <p>a) 1.25 points b) 1.25 points c) 1.25 points d) 1.25 points</p>	5	
Total Points Available:			80	
Total Point Needed to be Considered Compliant (60%):			48	



ATTACHMENT 2 TO PART 4 – FINANCIAL PROPOSAL FORM

1. Firm Price – Milestone Payments

Bidder tendered all-inclusive firm price to perform the work is in Canadian funds, applicable taxes excluded. Any Travel and Living Expenses and other miscellaneous expenses must be included in the firm price.

TASKS	DELIVERABLES/MILESTONES	TIMING <i>*Based on estimated award date of Feb 5, 2021</i>	Firm All-Inclusive Price
Task 1 Kick-off meeting and Submission of Draft Table of Contents	Kick-off meeting with Contractor and NRCan to: <ul style="list-style-type: none"> Contractor to submit draft table of contents to NRCan, in electronic Microsoft Office Word format. Following the format outline as approved by CCIAD. Draft Table of Contents to include references to other documents for additional details and information (if appropriate) and annotated bibliography/reference list. Review & refine project outline and level of information needed. NRCan to share any supplementary resources/documents that may be useful. NRCan to provide comments on draft table of contents.	Within 1 st week following award of contract	\$
Task 2 Submission of Final Table of Contents	Submission of final table of contents to NRCan, in electronic Microsoft Office Word format.	Within 2 nd week following award of contract	\$
Task 3 Submission of Draft Report Section 1: Landscape Scan/Foundational Research	Submission of draft summary of landscape scan/foundational research to NRCan, in electronic Microsoft Office Word format. NRCan to review the draft section.	Within 4 th week following award of contract	\$
Task 4 Submission of Draft Report Section 2: List of key features, functions and	Submission of draft list of key features/functions and case studies to NRCan, in electronic Microsoft Office Word format.	Within 4 th week following award of contract	\$



TASKS	DELIVERABLES/MILESTONES	TIMING <i>*Based on estimated award date of Feb 5, 2021</i>	Firm All-Inclusive Price
case studies	NRCan to review the draft section.		
Task 5 Submission of Draft Report Section 3: Analysis of Options	Submission of draft analysis of options, in electronic Microsoft Office Word format. NRCan to review the draft section.	Within 5 th week following award of contract	\$
Task 6 Check-in Meeting	Conference call with Contractor and NRCan to discuss progress and outstanding questions/concerns.	Within 5 th week following award of contract	\$
Task 7 Submission of Report Section 4: Implementation Roadmap	Submission of draft analysis of options, in electronic Microsoft Office Word format. NRCan to review the draft section.	Within 6 th week following award of contract	\$
Task 8 Submission of full draft report	Submission of draft report in electronic Microsoft Office Word format. Review of the draft report by NRCan. Meeting with Contractor and NRCan to discuss comments.	Within 6 th week following award of contract	\$
Task 9 Submission of final draft report	Submission, in English, of final edited version of the report in electronic form using Microsoft Word format.	Within 7 th week following award of contract	\$
Task 10 Presentation of final report	Conference call with Contractor and NRCan to present and discuss the final report. NRCan to receive copy of final presentation (in ppt format). Up to two additional presentations may be requested of the contractor, such as to internal departmental officials or to our key partners within the Adaptation Platform.	Within 8 th week following award of contract	\$
End of the Contract		March 31, 2021	\$



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 (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/25#integrity-provisions>), all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime 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>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: _____



OR

Name of each member of the joint venture:

- Member 1: _____
- Member 2: _____
- Member 3: _____
- Member 4: _____

Identification of the administrators/owners:

SURNAME	NAME	TITLE

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.

5.2.3 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.

5.2.4 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

5.2.5 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.



Professional fees	Amount
_____	_____
_____	_____

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.

5.2.6 Aboriginal Designation

Who is eligible?

- a) An Aboriginal business, which can be:
 - i) a band as defined by the Indian Act
 - ii) a sole proprietorship
 - iii) a limited company
 - iv) a co-operative
 - v) a partnership
 - vi) a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

- b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

- Our Company is NOT an Aboriginal Firm, as identified above.
- Our Company is an Aboriginal Firm, as identified above.

Signature

Date



PART 6 - SECURITY AND OTHER REQUIREMENTS

6.1 Security Requirements

There are no security requirements associated with this requirement.

6.2 Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.



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" and the Contractor's technical bid dated _____. (*to be completed at contract award*)

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 (2020-05-28), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

- As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

7.2.2 Supplemental General Conditions

The following clauses apply to and form part of this contract:

4007 (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information

7.3 Dispute Resolution

Mediation

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

Arbitration

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.



Meaning of "Dispute"

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will, on request or consent of the parties to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

7.4 Security Requirements

There is no security requirement applicable to the Contract.

7.5 Term of Contract

7.5.1 Period of the Contract

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

7.6 Comprehensive Land Claims Agreements (CLCAs)

The Contract is not subject to any Comprehensive Land Claims Agreements.

7.7 Authorities

7.7.1 Contracting Authority

The Contracting Authority for the Contract is:

Valerie Holmes

Procurement Specialist
Natural Resources Canada
580 Booth Street, 5th Floor
Ottawa, Ontario
K1A 0E4

Tel: 613-864-8017

Email: Valerie.holmes@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.



7.7.2 Project Authority

The Project Authority for the Contract is: *(to be provided at contract award)*

Name:
Title:
Organization:
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.

7.7.3 Contractor's Representative

(to be provided at contract award)

Name:
Title:
Organization:
Address:
Telephone:
Facsimile:
E-mail address

7.8 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.

7.9 Payment

7.9.1 Basis of Payment – Firm Price, Firm Unit Price(S) or Firm Lot Price(s)

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex “B” for a cost of \$ _____ *(amount inserted 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.



7.9.2 Method of Payment

Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract 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 work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.10 Invoicing Instructions

Invoices shall be submitted using the following method:

<p><u>E-mail:</u></p> <p>nrcan.invoiceimaging-servicedimageriedesfactures.nrcan@canada.ca</p> <p>Note: Attach "PDF" file. No other formats will be accepted</p>
--

Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the Contract number: _____ <inserted at time of contract award>

Invoicing Instructions to suppliers: <http://www.nrcan.gc.ca/procurement/3485>

7.11 Certifications and Additional Information

7.11.1 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.

7.12 Applicable Laws

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

7.13 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) - Canada to Own Intellectual Property Rights in Foreground Information;
- c) the general conditions **2035 (2020-05-28), Higher Complexity - Services**;
- d) **Annex "A"**, Statement of Work;
- e) **Annex "B"**, Basis of Payment;
- f) the Contractor's bid dated _____, *<inserted at time of contract award>*

7.14 Foreign Nationals (Canadian Contractor OR Foreign Contractor)

SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

OR

SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)

7.15 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

7.16 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the *Department of Public Works and Government Services Act* will review a complaint filed by [*the supplier or the contractor or the name of the entity awarded this contract*] respecting administration of this contract if the requirements of Subsection 22.2(1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

ANNEX “A” - STATEMENT OF WORK

SW1 Title

Supporting Climate Change Adaptation Implementation through Virtual Collaboration

SW2 Overview

Canada’s Climate Change Adaptation Platform is a deliverable of the Climate Change Impacts and Adaptation Division (CCIAD) of Natural Resources Canada (NRCan). Established in 2012, the Platform’s mandate is to align priorities and resources, strengthen collaboration between adaptation actors across Canada, and accelerate adaptation action, across key sectors and communities. The Platform is comprised of three (3) core components:

1. **Plenary** – a senior-level body (i.e. public sector Directors, private sector vice-presidents) that oversees work carried out under the Platform and provides strategic guidance for future areas of work and collaboration;
2. **Working Groups** – thematic groups comprised of experts that are responsible for designing and delivering a Program of Work; and
3. **Virtual Workspace** –an online portal (“extra-net”); Platform members are invited to use the workspace to support collaboration (e.g. file sharing, discussion, co-writing, hosting webinars, etc.)

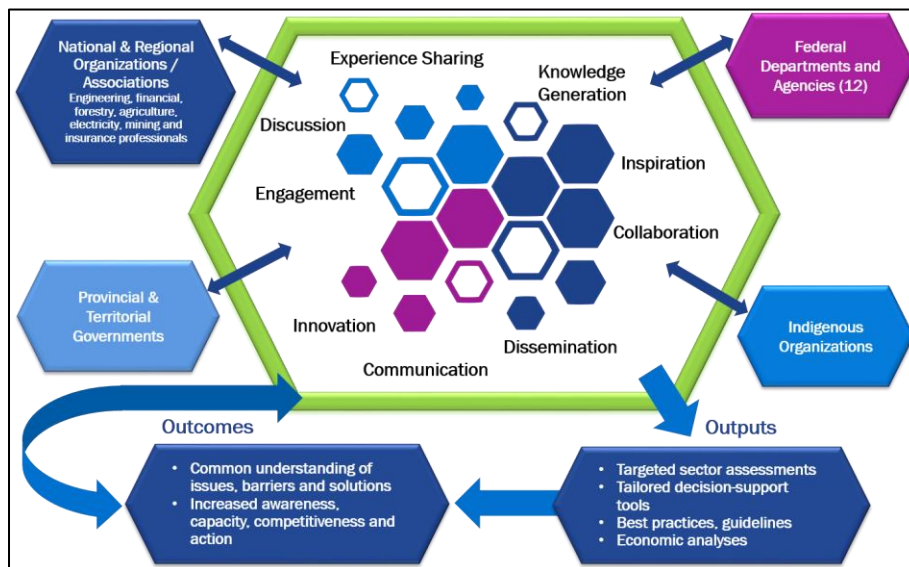


Figure 1. Canada’s Climate Change Adaptation Platform - Through many different mechanisms, Canada’s Climate Change Adaptation Platform brings together key adaptation actors to transform knowledge to action. The Platform works to ensure that decision-makers in regions and industry are equipped with the tools and information needed to adapt.

Many countries use web-based Climate Adaptation Platforms and Virtual Spaces to support action and collaboration on climate change adaptation. In Canada, there are a number of different platforms and networks on the topics of climate change mitigation and adaptation, including the Platform’s Virtual Workspace. However, despite these various sources for climate change adaptation information, resources, and collaboration, there is currently no single centralized, public-facing source to help bring alignment to these options.



This contract seeks to conduct a review and analysis in support of a potential new ‘Virtual Climate Change Adaptation Space’ for Canada (referred to below as “the Virtual Space”). It is the goal that this work will provide foundational knowledge to explore the implementation of a Virtual Adaptation Space in Canada, helping to bring our existing Platform to a level of utility comparable to other international examples, while learning from the challenges faced in other jurisdictions.

This work will help to ensure that future Virtual Space development is informed by current user experiences, as well as best practices and lessons learned, while remaining flexible to take advantage of emerging (technological) opportunities and delivering the best support possible for those taking climate change adaptation action. This work will also learn from the wide body of expertise on virtual collaboration that has accumulated in the last several decades and in the more recent months with the COVID-19 pandemic forcing work-from-home practice.

SW3 Objectives

The objective of this work is to conduct a review and analysis of best practices for designing and implementing Virtual Spaces, including advice on the variety of effective features, functions and activities for virtual fora and the efficacy of different options. Based on this analysis, the final deliverable will provide scaled recommendations (as a basis to decide what is necessary at a low-end of a scale through to add-ons for future elaboration), and a map that outlines the steps that would need to be taken to implement a Virtual Climate Change Adaptation Space in Canada. The scope of this deliverable will include recommendations for technical support, design and layout, navigation, content development, maintenance, analytics and reporting, as well as for modification across all stages of implementation to support site evolution, and effective and efficient workflow. The scope will also present options at different scales of resource availability and transformation.

Overall, the study will help us understand scaled options for a new Virtual Space, including the necessary resources to create and maintain each option, and to choose an approach to design and develop such a Space.

SW4 Project Requirements

SW4.1 Tasks

The contractor will prepare a report that includes:

- i. **Draft Table of Contents** delivered at the beginning of the contract;
- ii. **Landscape Scan/Foundational Research:** review of potential options and best practices for developing and delivering a Virtual Space for collaboration on climate adaptation. This may also include a review of past analyses; a review of reports on other country Platforms; survey results from KE4CAP exercise, etc. (key resources to be included in this initial review will also be provided by Project Authority).
 - a. Preference given to Virtual Spaces directly related to climate change or climate change adaptation, however this research should also include best practices and functions from other comparable Virtual Spaces across topics also requiring multi-sector, multi-level involvement and collaboration (e.g. examples from comparable communities or purposes, such as platforms for water or land-use, risk management, Canadian defense and security, Indigenous climate hubs, etc.)
- iii. **List of key features and functions:** provide a list of common ‘must-have’ features and functions, which may also include 3-4 case study examples that highlight key or particularly innovative components or features from noted Virtual Spaces that could be an effective feature or function to include.



- iv. **Analysis of options:** based on foundational research above, prepare an analysis for creating an enhanced Virtual Space for climate change adaptation. This analysis will address how to best compliment the structure and function of Canada’s Climate Change Adaptation Platform and evolve to address identified challenges and opportunities (e.g., engagement/ participation, membership). In developing the analysis, the following elements are also to be considered:
- a. **Outsourced Technical Development and Design Support:** Support from outside sources for the design, development, testing and improvement. This would include support for IT services to bolster internal IT resources; modular development; co-development approaches and user consultation/testing; friendly user and administrator design, information architecture, and navigation; capacity for customizing design and layout; technology for integrating and visualising different types of data and information; technology for dynamic integration with other platforms; developing interactive and ‘smart’ features and functions to support users; and, the advantages and disadvantages of different operating systems.
 - b. **Content Development and Management:** Understanding of best practices for ongoing content development and incorporating various content types into Virtual Space. Includes materials independently sourced, as well as those developed through Core program and partner mechanisms; translation and “WCAG-2” web-accessible content as per Government of Canada Treasury Board requirements; translation for specific target audiences, such as Indigenous languages;
 - c. **Regular maintenance:** Understanding the capacities, systems, and or resources necessary to support regular maintenance of virtual space. This would include: quality assurance / quality control of content; technical support; mechanism, protocols and processes for keeping content relevant and current;
 - d. **Modification and improvement:** Understanding the capacities, systems, and or resources necessary for ongoing modification and improvement of the Virtual Space. Platform is envisioned as an evergreen, organic mechanism, designed with flexibility to evolve as demand changes for new material, tools, workflow and activities (including regular updates as needed); conducting Beta testing, implementing modifications and fine-tuning; means to solicit input and feedback from users;
 - e. **User Access and Engagement:** Understanding of best practices and examples of strengthening user access and engagement: working to ensure Virtual Space is available to a wide range of users, and that these users feel open to remain engaged and participatory. This would include new Virtual Space considers options for accessibility, including options to expand membership to non-traditional partners that are considered to be outside the realm of climate change adaptation (e.g. factoring in social equity, asset management); Also to ensure that lower-capacity stakeholders are able to easily participate, access available information and tools, and build networks - including to explore alternatives (e.g. for those who do not have access to internet / computer) - and what opportunities exist or have been tested to address this gap; as well as to aspire to increase engagement with the type and level of user participation in content development, discussion forums, hosting capabilities, etc.
- v. **Implementation Roadmap:** based on the analysis outlined above, provide a closing section (presented in a visual format e.g. table or figure, not text) that presents a tangible ‘roadmap’ of the approach and roll-out plan that is necessary to implement a proposed new Virtual Space for climate adaptation:
- a. Recommendations will provide a very specific outline for the next steps, and the timing necessary for development and implementation of the new Virtual Space.
 - b. Recommendations will be presented with the following information:



- i. **Chronological priority:** action items presented by chronological priority (e.g. what steps need to be taken first in implementation process?)
- ii. **Resource requirement:** in addition to chronology, different action items will present a different resource/capacity demand (e.g. financial cost, human resource needs). For example, options that appear transformative may not actually have a high resource demand, and this information is key to implementation and priority-setting.
- iii. Together, an understanding of chronology and resource requirement is necessary to support decision-making and future budget planning.

vi. **A closing list of resources** to aid further research or for taking the next steps in implementation.

All final products are for internal use only, not external consumption. A presentation will be made of the final report to the Project Authority (implicated team members of the Climate Change Impacts and Adaptation Division, at Natural Resources Canada). Up to two additional presentations may also be requested for internal departmental officials and/or interested external partners (e.g. Senior NRCan officials, Plenary of Canada's Climate Change Adaptation Platform).

SW4.2 Deliverables

The Contractor will prepare the following deliverables:

1. One draft table of contents
2. Electronic drafts and a final report in Word format to the Project Authority that includes the following components:
 - a. Landscape scan/foundational research;
 - b. List of key features and functions, and 3-4 case study examples;
 - c. Analysis of options;
 - d. Visual 'Implementation Roadmap'; and
 - e. List of Additional Resources; and
3. Final presentation (PPT form)

The report will be no more than 30 pages in length, and is to be delivered (along with any tables and figures), in electronic form, using Microsoft Word.

All Intellectual Property that arises in the course of the contract, including but not limited to the final report, shall vest in NRCan.



SW4.3 Milestones and Schedule

TASKS	DELIVERABLES/MILESTONES	TIMING <i>*Based on estimated award date of February 5, 2021.</i>
<p>Task 1 Kick-off meeting and Submission of Draft Table of Contents</p>	<p>Kick-off meeting with Contractor and NRCan to:</p> <ul style="list-style-type: none"> Contractor to submit draft table of contents to NRCan, in electronic Microsoft Office Word format. Following the format outline as approved by CCIAD. Draft Table of Contents to include references to other documents for additional details and information (if appropriate) and annotated bibliography/reference list. Review & refine project outline and level of information needed. NRCan to share any supplementary resources/documents that may be useful. <p>NRCan to provide comments on draft table of contents.</p>	<p>Within 1st week following award of contract</p>
<p>Task 2 Submission of Final Table of Contents</p>	<p>Submission of final table of contents to NRCan, in electronic Microsoft Office Word format.</p>	<p>Within 2nd week following award of contract</p>
<p>Task 3 Submission of Draft Report Section 1: Landscape Scan/Foundational Research</p>	<p>Submission of draft summary of landscape scan/foundational research to NRCan, in electronic Microsoft Office Word format.</p> <p>NRCan to review the draft section.</p>	<p>Within 4th week following award of contract</p>
<p>Task 4 Submission of Draft Report Section 2: List of key features, functions and case studies</p>	<p>Submission of draft list of key features/functions and case studies to NRCan, in electronic Microsoft Office Word format.</p> <p>NRCan to review the draft section.</p>	<p>Within 4th week following award of contract</p>
<p>Task 5 Submission of Draft Report Section 3: Analysis of Options</p>	<p>Submission of draft analysis of options, in electronic Microsoft Office Word format.</p> <p>NRCan to review the draft section.</p>	<p>Within 5th week following award of contract</p>
<p>Task 6 Check-in Meeting</p>	<p>Conference call with Contractor and NRCan to discuss progress and outstanding questions/concerns.</p>	<p>Within 5th week following award of contract</p>



TASKS	DELIVERABLES/MILESTONES	TIMING <i>*Based on estimated award date of February 5, 2021.</i>
Task 7 Submission of Report Section 4: Implementation Roadmap	Submission of draft analysis of options, in electronic Microsoft Office Word format. NRCan to review the draft section.	Within 6 th week following award of contract
Task 8 Submission of full draft report	Submission of draft report in electronic Microsoft Office Word format. Review of the draft report by NRCan. Meeting with Contractor and NRCan to discuss comments.	Within 6 th week following award of contract
Task 9 Submission of final draft report	Submission, in English, of final edited version of the report in electronic form using Microsoft Word format.	Within 7 th week following award of contract
Task 10 Presentation of final report	Conference call with Contractor and NRCan to present and discuss the final report. NRCan to receive copy of final presentation (in ppt format). Up to two additional presentations may be requested of the contractor, such as to internal departmental officials or to our key partners within the Adaptation Platform.	Within 8 th week following award of contract
End of the Contract		March 31, 2021

SW4.4 Reporting Requirements

The Contractor will meet three (3) times with CCIAD, first at the start of the contract to review and finalize the project details. The Contractor will then meet with CCIAD after delivery of Tasks 3 through 6, and finally at the completion of the contract. The meetings will take place by teleconference or videoconference using a mutually agreed upon platform.

SW5 Other Terms and Conditions of SOW

SW5.1 Contractor’s Obligations

In addition to the obligations outlined in Section 4 of this Statement of Work, the Contractor shall:

- Submit all reports in electronic Microsoft Office Word format unless specified otherwise;
- Participate in three (3) tele-conference or video-conference meetings; and
- Deliver at least one closing presentation by video conference to the Project Authority.
 - o Up to two additional presentations may be requested of the contractor, such as to internal departmental officials or to our key partners within the Adaptation Platform.



SW5.2 NRCan's Obligations

NRCan (CCIAD) will facilitate effective and efficient project completion by:

- Managing meetings and overseeing report development;
- Providing web links to key document/s required;
- Providing comments on draft reports within five working days; and,
- Offering other assistance or support as needed.

SW5.3 Location of Work, Work Site and Delivery Point

Work is expected to be completed at the Contractor's place of business¹.

SW5.4 Language of Work

Communication and correspondence will be in English. Final products are to be delivered in English.

¹ In respect of current restrictions and health and safety guidelines due to the ongoing COVID-19 pandemic, 'Contractor's place of business' may also include Contractor's home residence as relevant.



ANNEX "X" - BASIS OF PAYMENT

(to be completed at contract award)