



High Complexity Bid Solicitation and Resulting Contract

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

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

1.2 Summary

- 1.2.1 The objective of this requirement is to GBA plus and EDI Advisory Services to assist Canada Energy Regulator (CER) in fulfilling this commitment by reviewing its workplace and external-facing programs and services.

Contract period will be for one (1) year with four (4) one-year option periods.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website".
- 1.2.3 The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and the Annex "I" titled Federal Contractors Program for Employment Equity - Certification."



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- 1.2.4 This requirement is subject to the COVID-19 Vaccination Policy for Supplier Personnel. Failure to complete and provide the COVID-19 Vaccination Requirement Certification – Annex “E” as part of the bid will render the bid non-responsive.

1.3 Debriefings

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

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.

2.1.1 The **2003** (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

“Subsection 3.a) of Section 01, Integrity Provisions - Bid of Standard Instructions (**2003**) incorporated by reference above is deleted in its entirety and replaced with the following:

- a. at the time of submitting an arrangement under the Request for Supply Arrangements (RFSA), the Bidder has already provided a list of names, as requested under the [Ineligibility and Suspension Policy](#). During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of names “.

Subsection 5.4 of **2003**, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 180 days

2.2 Submission of Bids

Bids must be submitted only to Canadian Energy Regulator (CER) by email to proposal.propositions@cer-rec.gc.ca by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to Canadian Energy Regulator (CER) will not be accepted.

All emailed bids must be received before the bid closing date and time. Any email received after the bid closing date and time will not be accepted. Bidders should note the file attachment size limit is 10MB



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2.3 Former Public Servant

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

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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



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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: 2019-01](#) 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.

2.4 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.

2.5 Applicable Laws

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

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.



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2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
 - Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

The bid must be provided as separate attachment per following sections:

Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications
Section IV: Additional Information

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

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>).

Section I: Technical Bid

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

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



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Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the "Price Proposal" in Annex "G".

3.1.2 Exchange Rate Fluctuation

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

Section III: Certifications

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

Section IV: Additional Information

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, "financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada and Carol A. Hambleton will evaluate the bids.

4.1.1 Technical Evaluation

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

4.2 Basis of Selection

4.2.1 SACC Manual Clause A0027T, Basis of Selection – 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 20 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 30 points.
2. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60 % for the technical merit and 40% for the price.
3. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60 %.
4. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.



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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.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

| | | Bidder 1 | Bidder 2 | Bidder 3 |
|--------------------------------|------------------------------|-----------------------------|----------------------------|----------------------------|
| Overall Technical Score | | 115/135 | 89/135 | 92/135 |
| Bid Evaluated Price | | \$55,000.00 | \$50,000.00 | \$45,000.00 |
| Calculations | Technical Merit Score | $115/135 \times 60 = 51.11$ | $89/135 \times 60 = 39.55$ | $92/135 \times 60 = 40.88$ |
| | Pricing Score | $45/55 \times 40 = 32.73$ | $45/50 \times 40 = 36.00$ | $45/45 \times 40 = 40.00$ |
| Combined Rating | | 83.84 | 75.55 | 80.88 |
| Overall Rating | | 1st | 3rd | 2nd |

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.



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In accordance with the COVID-19 Vaccination Policy for Supplier Personnel, all Bidders must provide with their bid, the COVID-19 Vaccination Requirement Certification attached as Annex “E”, to this bid solicitation, to be given further consideration in this procurement process.

This Certification incorporated into the bid solicitation on its closing date is incorporated into, and forms a binding part of any resulting Contract.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

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

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



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PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

PART 7 -RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

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

7.1.2 Task Authorization

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

7.1.2.1 Task Authorization Process

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



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7.1.2.2 Canada's Obligation - Portion of the Work - Task Authorizations

Canada's obligation with respect to the portion of the Work under the Contract that is performed through task authorizations is limited to the total amount of the actual tasks performed by the Contractor.

Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

For each authorized task:

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;
- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

For all authorized tasks:

- i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

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.

7.2.2 Supplemental General Conditions

New SACC Manual Clause 4013 (2021), Supplemental General Conditions - Compliance with on-site measures, standing orders, policies, and rules, apply to and form part of the Contract.

The Contractor must comply and ensure that its employees and subcontractor's comply with all security measures, standing orders, policies or other rules in force at the site where the Work is performed.



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New SACC Manual Clause 4014 (2021), Supplemental General Conditions – Suspension of Work, apply to and form part of the Contract.

1. The Contracting Authority may at any time, by written notice, order the Contractor to suspend or stop the Work or part of the Work under the Contract for a period of up to 180 days. The Contractor must immediately comply with any such order in a way that minimizes the cost of doing so. While such an order is in effect, the Contractor must not remove any part of the Work from any premises without first obtaining the written consent of the Contracting Authority. Within these 180 days, the Contracting Authority must either cancel the order or terminate the Contract, in whole or in part, under section(s) *[insert section entitled "Default by the Contractor"]* _____ or *[insert section entitled "Termination for convenience"]* _____ of general conditions ____.
2. When an order is made under subsection 1, unless the Contracting Authority terminates the Contract by reason of default by the Contractor or the Contractor abandons the Contract, the Contractor will be entitled to be paid its additional costs incurred as a result of the suspension plus a fair and reasonable profit.
3. When an order made under subsection 1 is cancelled, the Contractor must resume work in accordance with the Contract as soon as practicable. If the suspension has affected the Contractor's ability to meet any delivery date under the Contract, the date for performing the part of the Work affected by the suspension will be extended for a period equal to the period of suspension plus a period, if any, that in the opinion of the Contracting Authority, following consultation with the Contractor, is necessary for the Contractor to resume the Work. Any equitable adjustments will be made as necessary to any affected conditions of the Contract.

7.3 Security Requirements

7.3.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

Security requirement for Canadian supplier:

The contractor/offeror must, at all times during the performance of the contract/standing offer, hold a valid designated organization screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC)

1. The contractor/offeror personnel requiring access to **protected** information, assets or sensitive work site(s) must **each** hold a valid **reliability status**, granted or approved by the CSP, PWGSC
2. The contractor/offeror **must not** remove any **protected** information or assets from the identified work site(s), and the contractor/offeror must ensure that its personnel are made aware of and comply with this restriction
3. Subcontracts which contain security requirements are **not** to be awarded without the prior written permission of the CSP, PWGSC
4. The contractor/offeror must comply with the provisions of the:
 1. Security Requirements Check List and security guide (if applicable), attached at Annex C.
 2. Contract Security Manual (latest edition)

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to XX, XXXX, 2022 inclusive.

7.4.2 Option to Extend the Contract



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The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one-year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Carol A. Hambleton
 Title: Senior Procurement Consultant
 Organization: Canadian Energy Regulator
 Accounting and Procurement
 Address: 517 Tenth Avenue SW, Suite 210
 Calgary, Alberta
 T2R 0A8

E-mail address: Carol.Hambleton@cer-rec.gc.ca

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

7.5.2 Project Authority (to be filled at award)

The Project Authority for the Contract is:

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.



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7.5.3 Contractor's Representative (to be filled at award)

Representative: _____

Title: _____

Address: _____

Telephone: _____

Email: _____

7.6 Payment

7.6.1 Basis of Payment

The Contractor will be paid for the Work specified in the authorized task authorization, in accordance with the Basis of payment at Annex "B".

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

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

7.6.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ TBD. Customs duties are excluded and Applicable Taxes are extra.
2. 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:
 - a. when it is 75% committed, or
 - b. four months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

3. 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.

7.6.3 Method of Payment - Monthly Payment

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:



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- a. an accurate and complete invoice and any other documents 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;

the Work performed has been accepted by Canada

7.6.4 Electronic Payment of Invoices – Contract

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

- a. Direct Deposit (Domestic and International);

7.6.5 Discretionary Audit

The estimated amount of profit included in the Contractor's price or rate certification is subject to audit by Canada, before or after payment is made to the Contractor under the conditions of the Contract. The purpose of the audit would be to determine whether the actual profit earned on a single contract if only one exists, or the aggregate of actual profit earned by the Contractor on a series of negotiated firm price and fixed-time rate contracts performed during a particular period selected, is reasonable and justifiable based on the estimated amount of profit included in earlier price or rate certification(s).

If the audit demonstrates that the actual profit is not reasonable and justifiable, as defined above, the Contractor must repay Canada the amount found to be in excess.

7.6.6 Time Verification

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

7.7 Invoicing Instructions

- a) The Contractor is required to provide the Project Authority with an invoice identifying the following information:
 - i. Task Authorization number;
 - ii. Names of Resources;
 - iii. Number of days and number of sitting hours/day;
 - iv. Simple breakdown of Work
 - v. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- b) The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
- c) Invoices must be distributed as follows:

<<insert the Project Authority email, prior to award>>



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7.8 Certifications and Additional Information

7.8.1 Compliance

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

7.9 Applicable Laws

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

7.10 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 general conditions **2035** (2020-05-28), General Conditions - Higher Complexity – Services;
- (c) the supplemental conditions **4013** (2021), General Supplemental Conditions – Compliance with on-line site measures, standing orders, policies and rules;
the supplemental conditions **4014** (2021), General Supplemental Conditions - Suspension of Work
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirement Checklist;
- (g) Annex D, Task Authorization Form;
- (h) Annex E, COVID-19 Vaccination Requirement Certification;
- (i) the Contractor's bid dated _____, (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award:*"), as clarified on _____ " *or* ", as amended on _____ " *and insert date(s) of clarification(s) or amendment(s)*".

7.11 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".



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ANNEX “A”

STATEMENT OF WORK

GBA plus and EDI Advisory Consultant Services

1. BACKGROUND

The Canada Energy Regulator (CER) is an independent federal, quasi-judicial regulator established to promote safety and security, environmental protection and economic efficiency in the Canadian public interest within the mandate set by Parliament for the regulation of pipelines, energy development and trade.

In the preamble of the *CER Act*, the Government of Canada “committed to assessing how groups of women, men and gender-diverse people may experience policies, programs and projects and to taking actions that contribute to an inclusive and democratic society and allow all Canadians to participate fully in all spheres of their lives.”

Combining an explicit EDI lens and GBA PLUS to the work we do will help us achieve our commitment so that we can better identify and address issues of systemic racism and discrimination that have particularly affected women, LGBTQ2+, visible minorities, Indigenous peoples, and people with disabilities, amongst others.

2. OBJECTIVE

The objective of this requirement is to provide EDI and GBA plus Advisory Services to assist the CER in fulfilling this commitment by reviewing its workplace and external-facing programs and services.

3. REQUIREMENT

The CER requires a Consultant team of a Senior EDI and GBA plus Consultant to provide English and/or French, EDI and GBA plus Advisory Services on an “As and When Required: Task Authorization Contract” to provide EDI and GBA plus Advisory Services.

Optional Intermediate EDI & GBA plus Consultant may be required to assist the Senior Consultant. Should an Intermediate Resource be required this will be identified in the individual Task Authorization Form.

Each Task Authorization will indicate if the entire team or which individual Resource classification will be needed to conduct the Work.

4. TASKS

Tasks are divided into two (2) streams:

Stream 1: Internal Services, includes the following:

- a. Management and Oversight,
- b. Communications;



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- c. Legal Services;
 - d. Human Resources Management;
 - e. Financial Management;
 - f. Information Management and Technology;
 - g. Real Property Management; and
 - h. Material & Acquisition Management.

Stream 2: External Programs and Services, includes the following:

a. Energy Adjudication

- Infrastructure, Tolls and Export Applications
- Participant Funding

b. Safety and Environmental Oversight

- Company Performance
- Emergency Management
- Management System and Industry Performance
- Regulatory Framework

c. Energy Information

- Energy System Information
- Pipeline Information

d. Engagement

- Indigenous Engagement
- Stakeholder Engagement

4.1 Senior EDI & GBA plus Consultant

Senior EDI & GBA plus Consultant will be required to provide one (1) or more of the following Tasks, each Task Authorization will be identified what Work the Senior EDI & GBA plus Consultant will be required to provide.

4.1.1 Internal Services

4.1.1.1 Research and Analysis

- 4.1.1.1.1 Help define/clarify research objectives and identify appropriate research methodologies;
- 4.1.1.1.2 Identify information need and identity-based disaggregated data gaps (e.g. race, sex, gender) to improve CER initiatives, regulatory strategy and policy and/or operations;
- 4.1.1.1.3 Collect, analyze, interpret and report on identify-based disaggregated data (e.g. race, sex, gender) and information, including identifying and analyzing historic and emerging trends;
- 4.1.1.1.4 Develop and conduct surveys and needs assessment;
- 4.1.1.1.5 Research best practices and sectoral/market trends;
- 4.1.1.1.6 Prepare, review and/or simplify into presentation studies, statistical reports and detailed reports of findings;
- 4.1.1.1.7 Recommend changes and improvements based on EDI and GBA plus findings;
- 4.1.1.1.8 Undertake and review, when relevant, historical and political contextual analyses in relation to Canada's relationship with Indigenous Peoples, racialized communities and other ethnic groups; and



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- 4.1.1.1.9 Undertake diagnoses, assessments and information gathering, including collection of sex and gender disaggregated data and information (i.e., statistics by sex, sexual orientation, gender identity, gender expressions, race/ethnicity, indigeneity, disability, language, geographic location, socio-economic status, among other statistics.

4.1.1.2 Policy Development and Implementation

- 4.1.1.2.1 Conceptualize the most appropriate approach to support policy and regulatory design and implementation through the application of the EDI lens and GBA plus findings;
- 4.1.1.2.2 Prepare options and recommendations informed by EDI and GBA plus findings;
- 4.1.1.2.3 Prepare and coordinate briefing material, reports, and speaking notes;
- 4.1.1.2.4 Review policy papers, policy direction, strategies, concept notes, corporate plans and reports and other documents using an intersectional lens;
- 4.1.1.2.5 Prepare, review and/or update a GBA plus, including reviewing risk assessments and mitigation measures; and
- 4.1.1.2.6 Plan, design organize and/or facilitate inclusive and accessible employee, public service and external engagement activities, including policy dialogue events and activities.

4.1.1.3 Program and Project Management

- 4.1.1.3.1 Design and implement project, programs/or other initiatives;
- 4.1.1.3.2 Support project/program design and implementation;
- 4.1.1.3.3 Participate in engagement activities and provide advice on inclusive participatory approaches in the planning of these activities, including events and meetings;
- 4.1.1.3.4 Organize and facilitate results-based project design workshops or working sessions with CER employees, internal committees and groups, leaders, partners, stakeholders, Indigenous partners and equality-seeking organizations;
- 4.1.1.3.5 Assist in the preparation of option papers, concept papers and project approval documents, including the development of project logic models (LM) and LM narratives, performance management frameworks (PMF) and PMF narratives, monitoring plans, risk registers, management plans and terms of reference. This includes providing advice on targets and indicators to measure EDI and GBA plus performance;
- 4.1.1.3.6 Analyze and make recommendations on the integration of EDI and GBA PLUS considerations into project/program design and planning documents, including templates and internal processes;
- 4.1.1.3.7 Prepare oral reports, written reports, briefing notes and talking points, which include diversity and inclusion considerations; and
- 4.1.1.3.8 Provide analyses and comments on internal and external documents produced by various stakeholders.

4.1.1.4 Training, Tools and Facilitation

- 4.1.1.4.1 Provide support in the process of developing and delivery EDI and GBA plus related training programs, courses and activities;



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- 4.1.1.4.2 Monitor EDI and GBA PLUS related training processes, including monitoring training methods and giving feedback on training areas that need to be improved;
 - 4.1.1.4.3 Plan and design team and individual EDI and GBA plus related courses and tools, and gather reports on the quality training and tools;
 - 4.1.1.4.4 Facilitate training on topics related to EDI, GBA plus and /or other analytical lenses;
 - 4.1.1.4.5 Design and develop EDI and GBA plus related training manuals and course materials which may include handouts and visual materials;
 - 4.1.1.4.6 Identify requirements to meet training needs;
 - 4.1.1.4.7 Develop and review tools such as guidelines and checklists;
 - 4.1.1.4.8 Deliver training, coaching and information sessions on equity, diversity, inclusion, GBA plus, antiracism, and other related themes;
 - 4.1.1.4.9 Mainstream EDI and GBA plus into existing curricula, courses, training activities, mentoring and coaching programs and tools;
 - 4.1.1.4.10 Research, analyze and make recommendations on Canadian, Indigenous and/or sectoral international trends and best practices to develop and enhance tools, guidelines, training, coaching and capacity building activities; and
 - 4.1.1.4.11 Support and/or facilitate knowledge-sharing, including planning and organizing accessible knowledge-sharing events and activities as well as, when appropriate, Indigenous knowledge transfer.

4.1.1.5 Evaluation and Monitoring

- 4.1.1.5.1 Assess and review institutional performance;
- 4.1.1.5.2 Develop and review monitoring and evaluation reports;
- 4.1.1.5.3 Develop and review results framework and performance measurement frameworks;
- 4.1.1.5.4 Identify indicators and develop baseline data;
- 4.1.1.5.5 Assess and review institutional oversight practices/systems, budget (program versus administrative costs), financial reports (financial statements, audits and internal controls) and human resources corporate strategies and action plans and corporate management practices and processes;
- 4.1.1.5.6 Assess and support corporate governance structures, including terms of reference, roles and responsibilities, guidelines, policies, decision-making processes; and
- 4.1.1.5.7 Report on results achieved to date, including lessons learned and promising practices.

4.1.2 External Programs and Services

4.1.2.1 Research & Analysis

- 4.1.2.1.1 Help define/clarify research objectives and identify appropriate research methodologies;
- 4.1.2.1.2 Identify information need and identity-based disaggregated data gaps (e.g. race, sex, gender) to improve CER initiatives, regulatory strategy and policy and/or operations;
- 4.1.2.1.3 Collect, analyze, interpret and report on identity-based disaggregated data (e.g. race, sex, gender) and information, including identifying and analyzing historic and emerging trends;
- 4.1.2.1.4 Develop and conduct surveys and needs assessment;
- 4.1.2.1.5 Research best practices and sectoral/market trends;
- 4.1.2.1.6 Prepare, review and/or simplify into presentation studies, statistical reports and detailed reports of findings;



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- 4.1.2.1.7 Recommend changes and improvements based on EDI and GBA plus findings;
 - 4.1.2.1.8 Undertake and review, when relevant, historical and political contextual analyses in relation to Canada's relationship with Indigenous Peoples, racialized communities and other ethnic groups; and
 - 4.1.2.1.9 Undertake diagnoses, assessments and information gathering, including collection of sex and gender disaggregated data and information (i.e. statistics by sex, sexual orientation, gender identity, gender expressions, race/ethnicity, indigeneity, disability, language, geographic location, socio-economic status, among other statistics).

4.1.2.2 Policy Development and Implementation

- 4.1.2.2.1 Conceptualize the most appropriate approach to support policy and regulatory design and implementation through the application of an EDI lens and GBA plus;
- 4.1.2.2.2 Prepare options and recommendations informed by EDI and GBA plus findings;
- 4.1.2.2.3 Prepare and coordinate briefing material, reports, and speaking notes;
- 4.1.2.2.4 Review policy papers, policy direction, strategies, concept notes, corporate plans and reports, and other documents using an intersectional lens;
- 4.1.2.2.5 Prepare, review and/or update a GBA plus, including reviewing risk assessments and mitigation measures; and
- 4.1.2.2.6 Plan, design organize and/or facilitate inclusive and accessible employee, public service and external engagement activities, including policy dialogue events and activities.

4.1.2.3 Program and Project Management

- 4.1.2.3.1 Design and implement project, programs/or other initiatives;
- 4.1.2.3.2 Support project/program design and implementation;
- 4.1.2.3.3 Participate in engagement activities and provide advice on inclusion participatory approaches in the planning of these activities, including events and meetings;
- 4.1.2.3.4 Organize and facilitate results-based project design workshops or working sessions with CER employees, internal committees and groups, leaders, partners, stakeholders, Indigenous partners and equality-seeking organizations;
- 4.1.2.3.5 Assist in the preparation of option papers, concept papers and project approval documents, including the development of project logic models (LM) and LM narratives, performance management frameworks (PMF) and PMF narratives, monitoring plans, risk registers, management plans and terms of reference. This includes providing advice on targets and indicators to measure EDI and GBA plus performance;
- 4.1.2.3.6 Analyze and make recommendations on the integration of EDI and GBA plus considerations into project/program design and planning documents, including templates and internal processes;
- 4.1.2.3.7 Prepare oral reports, written reports, briefing notes and talking points, which include diversity and inclusion considerations; and
- 4.1.2.3.8 Provide analyses and comments on internal and external documents produced by various stakeholders.

4.1.2.4 Training, Tools and Facilitation

- 4.1.2.4.1 Provide support in the process of developing and delivery EDI and GBA plus related training programs, courses and activities;



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- 4.1.2.4.2 Monitor EDI and GBA plus related training processes, including monitoring training methods and giving feedback on training areas that need to be improved;
 - 4.1.2.4.3 Plan and design team and individual EDI and GBA plus related courses and tools, and gather reports on the quality training and tools;
 - 4.1.2.4.4 Facilitate training on topics related to EDI, GBA plus and /or other analytical lenses;
 - 4.1.2.4.5 Design and develop EDI and GBA plus related training manuals and course materials which may include handouts and visual materials;
 - 4.1.2.4.6 Identify requirements to meet training needs;
 - 4.1.2.4.7 Develop and review tools such as guidelines and checklists;
 - 4.1.2.4.8 Deliver training, coaching and information sessions on equity, diversity, inclusion, GBA plus, antiracism and other related themes;
 - 4.1.2.4.9 Mainstream EDI and GBA plus into existing curricula, courses, training activities, mentoring and coaching programs and tools;
 - 4.1.2.4.10 Research, analyze and make recommendations on Canadian, Indigenous and/or sectoral international trends and best practices to develop and enhance tools, guidelines, training, coaching and capacity building activities; and
 - 4.1.2.4.11 Support and/or facilitate knowledge-sharing, including planning and organizing accessible knowledge-sharing events and activities as well as, when appropriate, Indigenous knowledge transfer.

4.1.2.5 Evaluation and Monitoring

- 4.1.2.5.1 Assess and review institutional performance;
- 4.1.2.5.2 Develop and review monitoring and evaluation reports;
- 4.1.2.5.3 Develop and review results framework and performance measurement frameworks;
- 4.1.2.5.4 Identify indicators and develop baseline data;
- 4.1.2.5.5 Assess and review institutional oversight practices/systems, budget (program versus administrative costs), financial reports (financial statements, audits and internal controls) and human resources corporate strategies and action plans and corporate management practices and processes;
- 4.1.2.5.6 Assess and support corporate governance structures, including terms of reference, roles and responsibilities, guidelines, policies, decision-making processes; and
- 4.1.2.5.7 Report on results achieved to date, including lessons learned and promising practices.

4.2 Intermediate EDI & GBA plus Consultant

Intermediate EDI & GBA plus Consultant will be required to provide one (1) or more of the following Tasks, any Task Authorization will be identified what Work the Intermediate EDI & GBA plus Consultant will be required to provide.

4.2.1 Internal Services

4.2.1.1 Research and Analysis

- 4.2.1.1.1 Help define/clarify research objectives and identify appropriate research methodologies;
- 4.2.1.1.2 Identify information need and identity-based disaggregated data gaps (e.g. race, sex, gender) to improve CER initiatives, regulatory strategy and policy and/or operations;



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- 4.2.1.1.3 Collect, analyze, interpret and report on identity-based disaggregated data (e.g. race, sex, gender) and information, including identifying and analyzing historic and emerging trends;
 - 4.2.1.1.4 Develop and conduct surveys and needs assessment;
 - 4.2.1.1.5 Research best practices and sectoral/market trends;
 - 4.2.1.1.6 Prepare, review and/or simplify into presentation studies, statistical reports and detailed reports of findings;
 - 4.2.1.1.7 Recommend changes and improvements based on EDI and GBA plus findings;
 - 4.2.1.1.8 Undertake and review, when relevant, historical and political contextual analyses in relation to Canada's relationship with Indigenous Peoples, racialized communities and other ethnic groups; and
 - 4.2.1.1.9 Undertake diagnoses, assessments and information gathering, including collection of sex and gender disaggregated data and information (i.e., statistics by sex, sexual orientation, gender identity, gender expressions, race/ethnicity, indigeneity, disability, language, geographic location, socio-economic status, among other statistics).

4.2.1.2 Policy Development and Implementation

- 4.2.1.2.1 Conceptualize the most appropriate approach to support policy and regulatory design and implementation through the application of the EDI lens and GBA plus findings;
- 4.2.1.2.2 Prepare options and recommendations informed by EDI and GBA plus findings;
- 4.2.1.2.3 Prepare and coordinate briefing material, reports, and speaking notes;
- 4.2.1.2.4 Review policy papers, policy direction, strategies, concept notes, corporate plans and reports and other documents using an intersectional lens;
- 4.2.1.2.5 Prepare, review and/or update a GBA plus, including reviewing risk assessments and mitigation measures; and
- 4.2.1.2.6 Plan, design organize and/or facilitate inclusive and accessible employee, public service and external engagement activities, including policy dialogue events and activities.

4.2.1.3 Program and Project Management

- 4.2.1.3.1 Design and implement project, programs/or other initiatives;
- 4.2.1.3.2 Support project/program design and implementation;
- 4.2.1.3.3 Participate in engagement activities and provide advice on inclusive participatory approaches in the planning of these activities, including events and meetings;
- 4.2.1.3.4 Organize and facilitate results-based project design workshops or working sessions with CER employees, internal committees and groups, leaders, partners, stakeholders, Indigenous partners and equality-seeking organizations;
- 4.2.1.3.5 Assist in the preparation of option papers, concept papers and project approval documents, including the development of project logic models (LM) and LM narratives, performance management frameworks (PMF) and PMF narratives, monitoring plans, risk registers, management plans and terms of reference. This includes providing advice on targets and indicators to measure EDI and GBA plus performance;
- 4.2.1.3.6 Analyze and make recommendations on the integration of EDI and GBA plus+ considerations into project/program design and planning documents, including templates and internal processes;
- 4.2.1.3.7 Prepare oral reports, written reports, briefing notes and talking points, which include diversity and inclusion considerations; and



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- 4.2.1.3.8 Provide analyses and comments on internal and external documents produced by various stakeholders.

4.2.1.4 Training, Tools and Facilitation

- 4.2.1.4.1 Provide support in the process of developing and delivery EDI and GBA plus related training programs, courses and activities;
- 4.2.1.4.2 Monitor EDI and GBA plus related training processes, including monitoring training methods and giving feedback on training areas that need to be improved;
- 4.2.1.4.3 Plan and design team and individual EDI and GBA plus related courses and tools, and gather reports on the quality training and tools;
- 4.2.1.4.4 Facilitate training on topics related to EDI, GBA plus and /or other analytical lenses;
- 4.2.1.4.5 Design and develop EDI and GBA plus related training manuals and course materials which may include handouts and visual materials;
- 4.2.1.4.6 Identify requirements to meet training needs;
- 4.2.1.4.7 Develop and review tools such as guidelines and checklists;
- 4.2.1.4.8 Deliver training, coaching and information sessions on equity, diversity, inclusion, GBA plus, antiracism, and other related themes;
- 4.2.1.4.9 Mainstream EDI and GBA plus into existing curricula, courses, training activities, mentoring and coaching programs and tools;
- 4.2.1.4.10 Research, analyze and make recommendations on Canadian, Indigenous and/or sectoral international trends and best practices to develop and enhance tools, guidelines, training, coaching and capacity building activities; and
- 4.2.1.4.11 Support and/or facilitate knowledge-sharing, including planning and organizing accessible knowledge-sharing events and activities as well as, when appropriate, Indigenous knowledge transfer.

4.2.1.5 Evaluation and Monitoring

- 4.2.1.5.1 Assess and review institutional performance;
- 4.2.1.5.2 Develop and review monitoring and evaluation reports;
- 4.2.1.5.3 Develop and review results framework and performance measurement frameworks;
- 4.2.1.5.4 Identify indicators and develop baseline data;
- 4.2.1.5.5 Assess and review institutional oversight practices/systems, budget (program versus administrative costs), financial reports (financial statements, audits and internal controls) and human resources corporate strategies and action plans and corporate management practices and processes;
- 4.2.1.5.6 Assess and support corporate governance structures, including terms of reference, roles and responsibilities, guidelines, policies, decision-making processes; and
- 4.2.1.5.7 Report on results achieved to date, including lessons learned and promising practices.

4.2.2 External Programs and Services

4.2.2.1 Research & Analysis

- 4.2.2.1.1 Help define/clarify research objectives and identify appropriate research methodologies;
- 4.2.2.1.2 Identify information need and identity-based disaggregated data gaps (e.g. race, sex, gender) to improve CER initiatives, regulatory strategy and policy and/or operations;



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- 4.2.2.1.3 Collect, analyze, interpret and report on identity-based disaggregated data (e.g. race, sex, gender) and information, including identifying and analyzing historic and emerging trends;
 - 4.2.2.1.4 Develop and conduct surveys and needs assessment;
 - 4.2.2.1.5 Research best practices and sectoral/market trends;
 - 4.2.2.1.6 Prepare, review and/or simplify into presentation studies, statistical reports and detailed reports of findings;
 - 4.2.2.1.7 Recommend changes and improvements based on EDI and GBA plus findings;
 - 4.2.2.1.8 Undertake and review, when relevant, historical and political contextual analyses in relation to Canada's relationship with Indigenous Peoples, racialized communities and other ethnic groups; and
 - 4.2.2.1.9 Undertake diagnoses, assessments and information gathering, including collection of sex and gender disaggregated data and information (i.e. statistics by sex, sexual orientation, gender identity, gender expressions, race/ethnicity, indigeneity, disability, language, geographic location, socio-economic status, among other statistics).

4.2.2.2 Policy Development and Implementation

- 4.2.2.2.1 Conceptualize the most appropriate approach to support policy and regulatory design and implementation through the application of an EDI lens and GBA plus;
- 4.2.2.2.2 Prepare options and recommendations informed by EDI and GBA PLUS findings;
- 4.2.2.2.3 Prepare and coordinate briefing material, reports, and speaking notes;
- 4.2.2.2.4 Review policy papers, policy direction, strategies, concept notes, corporate plans and reports, and other documents using an intersectional lens;
- 4.2.2.2.5 Prepare, review and/or update a GBA PLUS, including reviewing risk assessments and mitigation measures; and
- 4.2.2.2.6 Plan, design organize and/or facilitate inclusive and accessible employee, public service and external engagement activities, including policy dialogue events and activities.

4.2.2.3 Program and Project Management

- 4.2.2.3.1 Design and implement project, programs/or other initiatives;
- 4.2.2.3.2 Support project/program design and implementation;
- 4.2.2.3.3 Participate in engagement activities and provide advice on inclusion participatory approaches in the planning of these activities, including events and meetings.
- 4.2.2.3.4 Organize and facilitate results-based project design workshops or working sessions with CER employees, internal committees and groups, leaders, partners, stakeholders, Indigenous partners and equality-seeking organizations;
- 4.2.2.3.5 Assist in the preparation of option papers, concept papers and project approval documents, including the development of project logic models (LM) and LM narratives, performance management frameworks (PMF) and PMF narratives, monitoring plans, risk registers, management plans and terms of reference. This includes providing advice on targets and indicators to measure EDI and GBA PLUS performance;
- 4.2.2.3.6 Analyze and make recommendations on the integration of EDI and GBA plus considerations into project/program design and planning documents, including templates and internal processes;
- 4.2.2.3.7 Prepare oral reports, written reports, briefing notes and talking points, which include diversity and inclusion considerations; and



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- 4.2.2.3.8 Provide analyses and comments on internal and external documents produced by various stakeholders.

4.2.2.4 Training, Tools and Facilitation

- 4.2.2.4.1 Provide support in the process of developing and delivery EDI and GBA plus related training programs, courses and activities;
- 4.2.2.4.2 Monitor EDI and GBA plus related training processes, including monitoring training methods and giving feedback on training areas that need to be improved;
- 4.2.2.4.3 Plan and design team and individual EDI and GBA plus related courses and tools, and gather reports on the quality training and tools;
- 4.2.2.4.4 Facilitate training on topics related to EDI, GBA plus and /or other analytical lenses;
- 4.2.2.4.5 Design and develop EDI and GBA plus related training manuals and course materials which may include handouts and visual materials;
- 4.2.2.4.6 Identify requirements to meet training needs;
- 4.2.2.4.7 Develop and review tools such as guidelines and checklists;
- 4.2.2.4.8 Deliver training, coaching and information sessions on equity, diversity, inclusion, GBA plus, antiracism and other related themes;
- 4.2.2.4.9 Mainstream EDI and GBA plus into existing curricula, courses, training activities, mentoring and coaching programs and tools;
- 4.2.2.4.10 Research, analyze and make recommendations on Canadian, Indigenous and/or sectoral international trends and best practices to develop and enhance tools, guidelines, training, coaching and capacity building activities; and
- 4.2.2.4.11 Support and/or facilitate knowledge-sharing, including planning and organizing accessible knowledge-sharing events and activities as well as, when appropriate, Indigenous knowledge transfer.

4.2.2.5 Evaluation and Monitoring

- 4.2.2.5.1 Assess and review institutional performance;
- 4.2.2.5.2 Develop and review monitoring and evaluation reports;
- 4.2.2.5.3 Develop and review results framework and performance measurement frameworks;
- 4.2.2.5.4 Identify indicators and develop baseline data;
- 4.2.2.5.5 Assess and review institutional oversight practices/systems, budget (program versus administrative costs), financial reports (financial statements, audits and internal controls) and human resources corporate strategies and action plans and corporate management practices and processes;
- 4.2.2.5.6 Assess and support corporate governance structures, including terms of reference, roles and responsibilities, guidelines, policies, decision-making processes; and
- 4.2.2.5.7 Report on results achieved to date, including lessons learned and promising practices.

5. DELIVERABLES

- 5.1. Any tasks requiring written deliverables, a DRAFT must be provided electronically for review by the Project Authority four (4) calendar days prior to the end of the Task with the Final provided at the end of the associated Task Authorization;
- 5.2. Each Task Authorization will advise what language will be required for the deliverable.
- 5.3. Written material must be provided in a compatible application to Microsoft, Word 2009 or newer;



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- 5.4 Presentation material must be provided in compatible application to Microsoft, PowerPoint or newer; and
- 5.5 Meetings and presentations will be provided through either MS Teams or Zoom.

6. CONSTRAINTS

- 6.1. Transportation between the Contractor's offices and CER location are the responsibility of the Contractor and the Contractor's Resources. CER will not be held accountable for insurance or reimbursements for any travel;
- 6.2. Any travel being conducted in association with a Task Authorization, day of travel will only be a day prior to meeting date;
- 6.3. Decisions concerning revision of definition of policy or platform, as well as contractual obligations and requirements, are excluded from the Contractor services. The Resource must limit themselves to providing comments and recommendations only to the Project Authority (PA) or designated CER personnel on the issues associated in the Task;
- 6.4. The Contractor and Contractor's Resource(s) providing the services must be independent of direct control by servants of Canada and is not in any respect an employee or servant of Canada;
- 6.5. The Contractor During the performance of the Contract, the Contractor or Contractor's Resource(s) must not direct any agencies, or any personnel of any third parties with whom Canada has or intends to contract, to perform any action;
- 6.6. At all times during the provision of the required services, the Resource(s) is not to have access to any proprietary information including but not limited to financial information (including unit prices or rates) or technical information concerning any third parties with whom Canada has contracted or intends to contract, other than information that is in the public domain, (e.g., total value of contract(s) awarded);
- 6.7. All correspondence, either initiated by the Resource(s) or by any section of CER, must be submitted to the PA. Correspondence is defined as records of conversations or decisions as well as any written correspondence in any format;
- 6.8. The Contractor and the Contractor's Resource(s) must ensure that, at all times, they do not use the Government of Canada or the Client Agency designations, logos or insignias on any business cards, cubicle/office signs or written/electronic correspondence that in any manner leads other to perceive the Contractor or the Contractor's Resources as being an employee of Canada; and
- 6.9. Any communication with a Contractor regarding the quality of work performed pursuant to this Contract must be undertaken by official correspondence through the Contract Authority (CA).

7. RESPONSIBILITY OF THE CONTRACTOR

The Contractor responsibilities are as follows:

- 7.1. Will be responsible to accept or decline the level of effort provided by the PA for each of the Task Authorization within two (2) calendar days from receipt of the PA request;
- 7.2. Will advise the PA should the Work will require a additional Intermediate Resource;
- 7.3. Providing in writing to the PA on why an Intermediate Resource will be required to assist the Senior Resource;
- 7.4. Should the Contractor have an issue with the level of effort provided by the PA, the Contractor will be responsible to provide in an email a new level of effort and written reasoning on why the CER level of effort is inadequate to complete the Task;
- 7.5. Will be responsible for all travel arrangements for all Resources as per each Task Authorization;
- 7.6. For all Human Resources and Disciplinary Action for their Resources for the duration of the Contract;
- 7.7. For the immediate removal of any Resource, upon the request of the PA or CA;



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- 7.8. For abiding to the Level of Effort submitted by the Contractor for each Task Authorization;
- 7.9. For providing a Secondary Resource at the request of the PA, should the Primary not be available for a period of five (5) days or more or unable to further provide the Work associated on the Task Authorization;
- 7.10. To advise the PA and CA a minimum of two (2) days prior to the end of the recommended Contractor's Level of Effort if the task cannot be completed as per the level of effort provided by the Contractor. There must be a valid reasoning on why the task cannot be completed if the Level of Effort has been provided by the Contractor; and
- 7.11. To contact the CA, and only the CA, for any contractual issues concerning the Task Authorization Contract and/or Task Authorization.

8. RESPONSIBILITY OF RESOURCE

- 8.1. To send in writing to both the Contractor and the PA if they are unavailable to commence work if the Work is required to be conducted;
- 8.2. Will provide any written reports or documentation electronically to the PA on designated time periods established in each individual Task Authorizations; and
- 8.3. To provide a Weekly Status Report on the status on work conducted and where the task or the deliverable are within the required timeline of the Task Authorization.

9. RESPONSIBILITY OF THE CER

- 9.1. The CER will negotiate the level of effort with the Contractor; should there be concern by the Contractor on the level of effort provided by the PA;
- 9.2. PA will accept or decline any additional/replacement resources in writing to the Contractor within two (2) days of receiving résumé;
- 9.3. All available data, document and /or database access deemed necessary by the PA for the provision of the services established in the Task Authorization Description of the Work Required;
- 9.4. PA will advise the Resource a minimum of two (2) days prior to any required meetings that the Resource has to attend;
- 9.5. PA will provide a link via email to the Resource for any off-site virtual meetings;
- 9.6. PA will provide a review and recommendation within two (2) days of any DRAFT document associated in each individual Task Authorization;
- 9.7. PA will be responsible for notifying the CA immediately of any disciplinary issues regarding the Contractor's Resource;
- 9.8. CA will be responsible to immediately notifying by phone and then by a follow-up in writing via email to the Contractor of any non-urgent disciplinary issues; and
- 9.9. CER will be responsible for the immediate removal of the Contractor's Resource should there be an issue with safety to CER Employees and/or CER Resources and/or property. CA will immediately notify by phone and follow-up in writing via email to the Contractor for the reason(s) and circumstance(s) of the immediate removal of the Contractor's Resource.

10. WORK LOCATION AND HOURS

- 10.1. Each Task Authorization will indicate if Work will be required on or off-site;
- 10.2. Meetings will be conducted virtually using MS Teams or Zoom; and
- 10.3. Contractor must be available between the core work hours of 07:00 to 18:00 Mountain Time, Monday to Friday.

11. LANGUAGE

- 11.1. Language of Work to be conducted will be identified in each individual Task Authorization.



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12. **TRAVEL**

- 12.1. Each Task Authorization will identify if Travel and where will be required for the Team or Resource;
- 12.2. Travel will only be to the following CER locations:
 - Vancouver, British Columbia;
 - Calgary, Alberta;
 - Montreal, Quebec.
- 12.3. Travel arrangements will be the responsibility of the Contractor; and
- 12.4. Travel arrangements and reimbursement will be in accordance the Treasury Board National Joint Council Travel Directive: <http://www.njccnm.gc.ca/directive/d10/en>.



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ANNEX “B”

BASIS OF PAYMENT

Definition of a Day/Proration

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\text{(Hours worked} \times \text{applicable firm per diem rate)} \div 7.5 \text{ hours}$$

- i. All proposed personnel must be available to work outside normal office hours during the duration of the Contract.
- ii. No overtime charges will be authorized under the Contract. All time worked will be compensated according to paragraph above.

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

| | Period | All-inclusive fixed Hourly Rate | Estimated Volumetric Data |
|---|--|--|----------------------------------|
| | | A | B |
| Initial Contract Period: From XX XXXX, 2021 to XX XXXX, 2022 | | | |
| 1a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 1b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 1: From XX XXXX, 2022 to XX XXXX, 2023 | | | |
| 2a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 2b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 2: From XX XXXX, 2023 to XX XXXX, 2024 | | | |
| 3a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 3b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 3: from XX XXXX, 2024 to XX XXXX, 2025 | | | |
| 4a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 4b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 4 - XX XXXX, 2025 to XX XXXX, 2026 | | | |



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| | | | |
|----|--|----------|-------------|
| 5a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 5b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |



ANNEX "C"

Security Requirement Checklist

Clear Data - Effacer les données

| | | |
|--|---|---|
| | Government of Canada / Gouvernement du Canada | Contract Number / Numéro du contrat 21-0046 |
| English Instructions / Instructions françaises | | Security Classification / Classification de sécurité |

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

| PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE | | | |
|--|---|---|---|
| 1. Originating Government Department or Organization Ministère ou organisme gouvernemental d'origine Canada Energy Regulator | 2. Branch or Directorate / Direction générale ou Direction | | |
| 3. a) Subcontract Number / Numéro du contrat de sous-traitance | 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant | | |
| 4. Brief Description of Work - Brève description du travail EDI & GBA+ Consulting Services | | | |
| 5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? | | | |
| | | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? | | | |
| | | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 6. Indicate the type of access required - Indiquer le type d'accès requis | | | |
| 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) | | | |
| | | | <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui |
| 6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p.ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. | | | |
| | | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? | | | |
| | | | <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui |
| 7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès | | | |
| Canada | <input checked="" type="checkbox"/> | NATO / OTAN | <input type="checkbox"/> |
| | | Foreign / Étranger | <input type="checkbox"/> |
| 7. b) Release restrictions / Restrictions relatives à la diffusion | | | |
| No release restrictions Aucune restriction relative à la diffusion | All NATO countries Tous les pays de l'OTAN | No release restrictions Aucune restriction relative à la diffusion | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Not releasable À ne pas diffuser | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Restricted to: / Limité à : | Restricted to: / Limité à : | Restricted to: / Limité à : | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Specify country(ies): / Préciser le(s) pays : | Specify country(ies): / Préciser le(s) pays : | Specify country(ies): / Préciser le(s) pays : | |
| | | | |
| 7. c) Level of information / Niveau d'information | | | |
| PROTECTED A PROTÉGÉ A | NATO UNCLASSIFIED NATO NON CLASSIFIÉ | PROTECTED A PROTÉGÉ A | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| PROTECTED B PROTÉGÉ B | NATO RESTRICTED NATO DIFFUSION RESTREINTE | PROTECTED B PROTÉGÉ B | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| PROTECTED C PROTÉGÉ C | NATO CONFIDENTIAL NATO CONFIDENTIEL | PROTECTED C PROTÉGÉ C | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| CONFIDENTIAL CONFIDENTIEL | NATO SECRET NATO SECRET | CONFIDENTIAL CONFIDENTIEL | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| SECRET SECRET | COSMIC TOP SECRET COSMIC TRÈS SECRET | SECRET SECRET | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| TOP SECRET TRÈS SECRET | | TOP SECRET TRÈS SECRET | |
| <input type="checkbox"/> | | <input type="checkbox"/> | |
| TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) | | TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) | |
| <input type="checkbox"/> | | <input type="checkbox"/> | |

Security Classification / Classification de sécurité





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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity.
Dans l'affirmative, indiquer le niveau de sensibilité : No Yes
Non Oui
9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Short Title(s) of material / Titre(s) abrégé(s) du matériel : No Yes
Non Oui
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis
- | | | | |
|--|---|---|--|
| <input type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL | <input type="checkbox"/> SECRET SECRET | <input type="checkbox"/> TOP SECRET TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS | | | |
- Special comments:
Commentaires spéciaux : Personnel to execute most of the work off site. If site presence is required, personnel will be escorted at all time.
- NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No Yes
Non Oui
- If Yes, will unscreened personnel be escorted:
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui
11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No Yes
Non Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No Yes
Non Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui
11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No Yes
Non Oui

Security Classification / Classification de sécurité

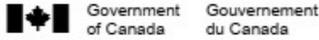
TBS/SCT 350-103 (2004/12)





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PART C (continued) / PARTIE C (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

| Category Catégorie | PROTECTED PROTÉGÉ | | | CLASSIFIED CLASSIFIÉE | | | NATO | | | | COMSEC | | | | | |
|--|--------------------------|-------------------------------------|--------------------------|------------------------------|--------------------------|---------------------------|--|--|--------------------------|---|--------------------------|--------------------------|--------------------------|------------------------------|--------------------------|---------------------------|
| | A | B | C | Confidential Confidentiel | Secret | Top Secret Très Secret | NATO Restricted NATO Diffusion Restreinte | NATO Confidential NATO Confidentiel | NATO Secret | COSMIC Top Secret COSMIC Très Secret | Protected Protégé | | | Confidential Confidentiel | Secret | Top Secret Très Secret |
| | | | | | | | | | | | A | B | C | | | |
| Information / Assets Renseignements / Biens | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Production | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| IT Media Support TI | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| IT Link Lien électronique | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée.

12. b) Will the document attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

| |
|--|
| Security Classification / Classification de sécurité |
|--|



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ANNEX "D"

TASK AUTHORIZATION FORM

| TASK AUTHORIZATION | | |
|--|-------------------------------------|------------------------------------|
| Contract Number: _____ | | |
| Financial Coding: _____ | | |
| Date: _____ | | |
| TA Request (For completion by Technical Authority) | | |
| <p>1. Description of Work to be Performed</p> <p style="text-align: center;">Statement of Work [Insert details]</p> <p style="text-align: center;">Description of any Deliverable(s) required</p> | | |
| | To: | |
| [Indicate where the work will be performed] | | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Specify: _____ | | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Specify: _____ | | |
| Fixed Price <input type="checkbox"/> | \$ _____ | |
| 7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL | | |
| <input type="checkbox"/> Reliability Status <input type="checkbox"/> Secret <input type="checkbox"/> Top Secret <input type="checkbox"/> Other | | |
| 8. BILINGUALISM (if applicable) | | |
| <input type="checkbox"/> YES | | <input type="checkbox"/> NO |
| List of the categories of personnel | | |
| TA Proposal (For completion by Contractor) | | |
| 9. Estimated Cost Contract <Insert additional rows as required> | | |
| Firm Unit Rate | Estimated # of hours or days | Total cost |
| | | |
| | | |
| | | |
| Total | | <TBD> |
| GST | | |
| Grand Total | | |
| Estimated Cost | | |
| GST | | |
| Total Travel & Living Cost | | |
| Grand Total for Labour and Travel | | <TBD> |
| TA Approval | | |



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| 10. Signing Authorities | |
|---|-----------------------------------|
| Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor [type or print] | Contractor |
| Name, Title and Signature of Individual Authorized to Sign on Behalf of the CER | CER – Technical Authority |
| Name, Title and Signature of Individual Authorized to Sign on Behalf of CER | CER- Contracting Authority |
| 11. Basis of Payment & Invoicing | |
| <p>In Accordance with the article entitled “Basis of Payment” in the Contract.</p> <p>Payment to be made based on receipt of detailed invoices for services rendered, subject to full acceptance by the Project/Technical Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Project/Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority.</p> | |
| * Conflict of Interest | |
| <p>The Contractor agrees that it is a term of the Contract that no person who is not in compliance with the provisions of the Conflict of Interest and Post-Employment Code for Public Office Holders or the Values and Ethics Code for the Public Sector (2011), shall derive any direct benefit from this Contract.</p> <p>The Contractor agrees to maintain financial independence from CER regulated companies and, for the duration of a Contract, agrees to:</p> <ul style="list-style-type: none"> • Maintain confidentiality in all work conducted for the CER; • Maintain the independence of its staff working on CER projects from its staff who may be working for CER regulated companies on other projects; • Not represent or work for parties or participants involved in any CER proceeding (including the applicant or interveners) if it has been contracted by the CER to provide services on said proceeding. • Disclose any conflict of interest. | |



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Annex “E” – COVID-19 Vaccination Requirement Certification

I, _____ (*first and last name*), as the representative of _____ (*name of business*) pursuant to _____ (*insert solicitation number*), warrant and certify that all personnel that _____ (*name of business*) will provide on the resulting Contract who access federal government workplaces where they may come into contact with public servants will be:

- (a) fully vaccinated against COVID-19 with Health Canada-approved COVID-19 vaccine(s); or
- (b) for personnel that are unable to be vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the *Canadian Human Rights Act*, subject to accommodation and mitigation measures that have been presented to and approved by Canada; until such time that Canada indicates that the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel are no longer in effect.

I certify that all personnel provided by _____ (*name of business*) have been notified of the vaccination requirements of the Government of Canada’s COVID-19 Vaccination Policy for Supplier Personnel, and that the _____ (*name of business*) has certified to their compliance with this requirement.

I certify that the information provided is true as of the date indicated below and will continue to be true for the duration of the Contract. I understand that the certifications provided to Canada are subject to verification at all times. I also understand that Canada will declare a contractor in default, if a certification is found to be untrue, whether made knowingly or unknowingly, during the bid or contract period. Canada reserves the right to ask for additional information to verify the certifications. Failure to comply with any request or requirement imposed by Canada will constitute a default under the Contract.

Signature: _____

Date: _____

Optional

For data purposes only, initial below if your business already has its own mandatory vaccination policy or requirements for employees in place. Initialing below **is not** a substitute for completing the mandatory certification above.

Initials: _____



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Information you provide on this Certification Form and in accordance with the Government of Canada's COVID-19 Vaccination Policy for Supplier Personnel will be protected, used, stored and disclosed in accordance with the Privacy Act. Please note that you have a right to access and correct any information on your file, and you have a right to file a complaint with the Office of the Privacy Commissioner regarding the handling of your personal information. These rights also apply to all individuals who are deemed to be personnel for the purpose for the Contract and who require access to federal government workplaces where they may come into contact with public servants.



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ANNEX “F” Bid Evaluation Criteria

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Bidders are advised to address each criterion in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory criteria may be excluded from further considerations. The technical proposal should address each of the criteria in the order in which they appear.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/ responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

| Criterion ID | Mandatory Criteria | Information to be provided: |
|----------------------------------|--|---|
| Senior EDI & GBA plus Consultant | | |
| M1 | Proponent must have a minimum of 2 years of experience as a firm providing EDI & GBA plus consulting services. | The following must be provided: <ul style="list-style-type: none"> • Company Profile, • Date Company was established/years in business. |



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| Criterion ID | Mandatory Criteria | Information to be provided: |
|--------------|--|---|
| M2 | Proponent must have been awarded as a firm a minimum of two (2) contracts for providing the EDI & GBA plus consulting services in the last five (5) years. | <p>The following must be provided:</p> <ul style="list-style-type: none"> • Name and description of client organization and relevant experience; • Timeframe (from-to dates month/year); • Description of the roles and responsibilities for each contract; and • Provide one reference (Contract Authority name, email and phone number) <p>*Reference cannot be CER*</p> |
| M3 | Proponent must provide one (1) Senior Proposed Resource that has a minimum of six (6) years' experience providing EDI & GBA plus. | <p>The following must be provided:</p> <ul style="list-style-type: none"> • Name of each Resource; • Provide Résumé |
| M4 | Proponent must ensure that the Proposed Senior Resource can provide the EDI & GBA plus services in French. | <p>The following must be provided:</p> <ul style="list-style-type: none"> • Provide Proponent's name • Contact Information <p>Note: Project Authority will have a brief conversation with Resource to ensure that Resource can communicate in French.</p> |
| M5 | Proponent must provide two (2) references, one (1) reference that is a Public Servant that services were provided to in Government (Federal, Provincial and Municipal or Agency) & one (1) Reference within the Private Sector or Indigenous Organization or Tribunals or Non-Profit Organizations where EDI & GBA plus services were provided in the last five (5) years. | <p>The following must be provided for each Reference:</p> <ul style="list-style-type: none"> • Name of Client; • Name of Department and Private Sector/Tribunal/Non-Profit Organization; • Positions that Reference held (i.e., Project Authority); • Email address <p>Note: if CER cannot contact or verify that the government resource is a Public Servant, then the Proponent will be considered non-compliant.</p> |



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| Criterion ID | Mandatory Criteria | Information to be provided: |
|--------------|--|--|
| M6 | Proponent must clearly demonstrate that the proposed Senior Resource has provided at minimum of one (1) EDI & GBA plus training session in French in within the last five (5) years. | The following must be provided: <ul style="list-style-type: none"> • Name of Client; • Name of Department and/or Private Sector/Tribunal/Non-Profit Organization; • Length of Training; Material covered in Training. |
| M7 | Proponent must provide Annex "E" COVID-19 Vaccination Requirement Certification. | The following must be provided: Signed Annex "E". |

POINT RATED TECHNICAL CRITERIA

The criteria contained herein will be used by CER to evaluate each proposal that has met all of the mandatory criteria. Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. CER's assessment will be based solely on the information contained within the proposal. CER may confirm information or seek clarification from bidders.

Only those proposals which are responsive (compliant) with all of the mandatory criteria and then achieve (or exceed) required for the point rated technical criteria section will be further considered for award of a contract. Proposals not meeting the minimum points required will be deemed non-responsive.

| Point Rated Technical Criteria (RT) | | | |
|---|---|--|--|
| # | Point Rated Technical Criterion | Bid Preparation Instructions | Weighting (Points) |
| Senior EDI & GBA plus Consultant | | | |
| R1 | Proponent should clearly demonstrate that the Proposed Senior Resource has providing EDI & GBA plus consultant services on the following: <ol style="list-style-type: none"> 1) Research and Analysis; 2) Policy Development and Implementation; 3) Program and Project Management; 4) Training, Tools and Facilitation; and 5) Evaluation and Monitoring. | Recommended Information for criteria: <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. | Allocation of Points: Each of the criteria demonstrated will be allocated three (3) points each. Maximum points for Criteria – 15 points. |



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| | | | |
|----|--|--|---|
| R2 | <p>Proponent should clearly demonstrate that the Proposed Senior Resource has providing EDI & GBA plus consultant services on the following internal services:</p> <ol style="list-style-type: none"> 1) Management & Oversight; 2) Communications; 3) Legal Services; 4) Human Resources Management; 5) Financial Management; 6) Information Management and Technology; 7) Real Property Management and 8) Material & Acquisition Management. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Allocation of Points:</p> <p>Each of the criteria demonstrated will be allocated two (2) points each.</p> <p>Maximum points for Criteria – 16 points.</p> |
| R3 | <p>Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of two (2) years providing Communication internal EDI & GBA plus consultant services.</p> | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Allocation of Points:</p> <p>Less than two (2) years' of experience - 0 points</p> <p>Two (2) years' of experience - 5 points</p> <p>Three (3) years' of experience - 10 points</p> <p>Four (4) years' of experience - 15 points.</p> <p>Five (5) years' of experience – 20 points</p> <p>More than five (5) years; of experience – 25 points</p> <p>Maximum points for Criteria – 25 points.</p> |
| R4 | <p>Proponent should clearly demonstrate that the Proposed Senior Resources has a minimum of two (2) years providing Human Resources Management internal EDI & GBA plus consultant services.</p> | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Allocation of Points:</p> <p>Less than two (2) years' of experience - 0 points</p> <p>Two (2) years' of experience - 5 points</p> <p>Three (3) years' of experience - 10 points</p> <p>Four (4) years' of experience - 15 points.</p> <p>Five (5) years' of experience – 20 points</p> |



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| | | | <p>More than five (5) years; of experience – 25 points</p> <p>Maximum points for Criteria – 25 points.</p> |
| R5 | <p>Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of two (2) years providing Information Management and Technology internal EDI & GBA plus consultant services.</p> | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. | <p>Allocation of Points:</p> <p>Less than two (2) years' of experience - 0 points</p> <p>Two (2) years' of experience - 5 points</p> <p>Three (3) years' of experience - 10 points</p> <p>Four (4) years' of experience - 15 points.</p> <p>Five (5) years' of experience – 20 points</p> <p>More than five (5) years; of experience – 25 points</p> <p>Maximum points for Criteria – 25 points.</p> |
| R6 | <p>Proponent should clearly demonstrate that the Proposed Senior Resource has providing EDI & GBA plus consultant services on externally facing programs for:</p> <ol style="list-style-type: none"> 1) Government (Federal, Provincial or Municipal), 2) Private Sector 3) Academic / Non-Profit Organizations 4) Indigenous Organizations 5) Regulator / Tribunal Organizations. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. | <p>Allocations of points:</p> <p>Each of the criteria demonstrated will be allocated five (5) points each.</p> <p>Maximum points for Criteria – 25 points.</p> |
| R7 | <p>Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of one (1) years' providing EDI & GBA plus consultant services to a Government entity (Federal, Provincial or Municipal).</p> | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; | <p>Allocation of Points:</p> <p>Less than on (1) year of experience - 0 points</p> <p>One (1) years of experience - 5 points</p> |



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| | | <ul style="list-style-type: none"> • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Two (2) years' of experience - 10 points</p> <p>Three (3) years' of experience - 15 points.</p> <p>Four (4) years' of experience – 20 points</p> <p>Five (5) years' of experience – 25 points</p> <p>More than five (5) years; of experience – 30 points</p> <p>Maximum points for Criteria – 30 points.</p> |
| R8 | Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of one (1) years' providing EDI & GBA plus consultant services to a Regulator/Tribunal Organizations (Federal, Provincial or Municipal). | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Allocation of Points:</p> <p>Less than on (1) year of experience - 0 points</p> <p>One (1) years of experience - 5 points</p> <p>Two (2) years' of experience - 10 points</p> <p>Three (3) years' of experience - 15 points.</p> <p>Four (4) years' of experience – 20 points</p> <p>Five (5) years' of experience – 25 points</p> <p>More than five (5) years; of experience – 30 points</p> <p>Maximum points for Criteria – 30 points.</p> |
| R9 | Proponent should clearly demonstrate that the Proposed Senior Resource has provided EDI & GBA plus consultant services to account for intersectionality with the following identify factors : <ul style="list-style-type: none"> 1) Indigenous 2) Black 3) Person of Colour 4) Other racialized groups 5) Neurodiversity | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); | <p>Allocation of Points:</p> <p>Each of the criteria will be allocated five (5) points each.</p> <p>Maximum points for Criteria – 35 points.</p> |



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| | | | |
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| | 6) Physical disabilities 7) LBGTQ2+ | Reference (Name, phone number and email address for each project. | |
| R10 | Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of three (3) years' experience in providing EDI & GBA plus Policy Development and Implementation services. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> Name and description of client organization; Description of Work provided; Timeframe (from to dates); Reference (Name, phone number and email address for each project. | <p>Allocation of Points:</p> <p>Less than three years' of experience — 0 points</p> <p>Three (3) years' of experience - 5 points</p> <p>Four (4) years' of experience — 10 points</p> <p>Five (5) years' of experience - 15 points.</p> <p>More than five (5) years; of experience – 20 points</p> <p>Maximum points for Criteria – 20 points.</p> |
| R11 | Proponent should clearly demonstrate that the Proposed Senior Resource has provided EDI & GBA+ training using mainstream EDI & GBA plus curricula for minimum of three (3) training sessions | <p>Information of details of project:</p> <ul style="list-style-type: none"> Name of Client; Name of Department and/or Private Sector/Tribunal/Non-Profit Organization; Length of Training; Material covered in Training. | <p>Allocation of Points:</p> <p>Less than three (3) training sessions – 0 points</p> <p>Three (3) training sessions – 5 points</p> <p>Four (4) to Six (6) training sessions – 10 points</p> <p>Six (6) to ten (10) training sessions – 15 points.</p> <p>More than ten (10) training sessions – 20 points</p> <p>Maximum points for Criteria – 20 points.</p> |
| R12 | Proponent should clearly demonstrate that the Proposed Senior Resource has a minimum of | Recommended Information for criteria: | Allocation of Points: |



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| | | | |
|--|--|---|---|
| | <p>three (3) years' experience in providing EDI & GBA plus Evaluation and Monitoring services.</p> | <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project). | <p>Less than three years' of experience - 0 points</p> <p>Three (3) years' of experience - 5 points</p> <p>Four (4) years' of experience - 10 points</p> <p>Five (5) years' of experience - 15 points.</p> <p>More than five (5) years; of experience – 20 points</p> <p>Maximum points for Criteria – 20 points.</p> |
| | | | |
| | | | |
| | | <p>Overall Total Allocated Points</p> | <p>286 points</p> |
| | | <p>Overall Minimum Points</p> | <p>172 points</p> |



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ANNEX “G” PRICE PROPOSAL

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid or each of the periods specified below its quoted all-inclusive fixed hourly rate (in Can \$) for each of the resource categories identified.

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.

The Canada Energy Regulator will conduct financial evaluation against only technically compliant responsive bids proposing a per diem rate that falls between the Median minus 20% and the Median plus 20% for each category.

If a firm per hour rate for any given resource category is either lower than the established lower median band limit or higher than the established upper median band limit for that resource category, the bid will be declared non-compliant and will be given no further consideration.

Establish the lower and upper median bands for the resource category.

For the resource category, the contracting Authority will establish, the median band limits based on the firm per hour rates proposed by the technically responsive bids. The median will be calculated using the median function in Microsoft Excel (i.e. when the total number of responses is odd, the median is calculated as the middle number in the group when sorted by rate; when the total number of responses is even, the median is calculated as the average of the two numbers in the middle).

Name of Firm: _____

Address: _____

Contact Person: _____

Phone number: (____) _____ - _____ Email: _____@_____

| | Period | All-inclusive fixed Hourly Rate | Estimated Volumetric Data |
|---|--|---------------------------------|---------------------------|
| Initial Contract Period: From XX XXXX, 2021 to XX XXXX, 2022 | | | |
| 1a | Senior GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 1b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 1: From XX XXXX, 2022 to XX XXXX, 2023 | | | |
| 2a | GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |



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| | | | |
|---|--|----------|-------------|
| 2b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 2: From XX XXXX, 2023 to XX XXXX, 2024 | | | |
| 3a | GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 3b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 3: from XX XXXX,2024 to XX XXXX, 2025 | | | |
| 4a | GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 4b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| Option Period 4 – XX XXXX, 2025 to XX XXXX, 2026 | | | |
| 5a | GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |
| 5b | Intermediate GBA plus & EDI Consultant | \$XXX.XX | 1,125 hours |

Title _____ *Date*

Name and Title (please print)



| | |
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ANNEX “H”

ADDITIONAL RESOURCES EVALUATION CRITERIA

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Annex. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

1.0 Mandatory Resource Assessment Criteria:

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Bidders are advised to address each criterion in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory criteria may be excluded from further considerations. The technical proposal should address each of the criteria in the order in which they appear.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/ responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

| Criterion ID | Mandatory Criteria | Proposal Page # |
|---|---|--|
| Intermediate EDI & GBA plus Consultants | | |
| M1 | Proponent must provide one (1) Intermediate Proposed Resource that has a minimum of three (3) years' experience providing EDI & GBA plus. | The following must be provided: <ul style="list-style-type: none"> • Name of each Resource; • Provide Résumé |



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| Criterion ID | Mandatory Criteria | Proposal Page # |
|--------------|--|--|
| M2 | <p>Proponent should clearly demonstrate that the Proposed Intermediate Resource has providing EDI & GBA plus consultant services on the following:</p> <ul style="list-style-type: none"> 6) Research and Analysis; 7) Policy Development and Implementation; 8) Program and Project Management; 9) Training, Tools and Facilitation; and 10) Evaluation and Monitoring. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. <p>*Note: if above information cannot be provided due to a non-disclosure between resource and client, in Name and Description of Client establish “Project Non-Disclosure Established”</p> |
| M3 | <p>Proponent should clearly demonstrate that the Proposed Intermediate Resource has providing EDI & GBA plus consultant services on the following internal services:</p> <ul style="list-style-type: none"> 9) Management & Oversight; 10) Communications; 11) Legal Services; 12) Human Resources Management; 13) Financial Management; 14) Information Management and Technology; 15) Real Property Management and Material & Acquisition Management. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. <p>*Note: if above information cannot be provided due to a non-disclosure between resource and client, in Name and Description of Client establish “Project Non-Disclosure Established”</p> |



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| Criterion ID | Mandatory Criteria | Proposal Page # |
|--------------|--|--|
| M4 | <p>Proponent should clearly demonstrate that the Proposed Intermediate Resource has providing EDI & GBA plus consultant services on externally facing programs for:</p> <ul style="list-style-type: none"> 6) Government (Federal, Provincial or Municipal), 7) Private Sector 8) Academic / Non-Profit Organizations 9) Indigenous Organizations 10) Regulator / Tribunal Organizations. | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. <p>*Note: if above information cannot be provided due to a non-disclosure between resource and client, in Name and Description of Client establish “Project Non-Disclosure Established”</p> |
| M5 | <p>Proponent should clearly demonstrate that the Proposed Intermediate Resource has provided EDI & GBA plus consultant services to account for intersectionality with the following identify factors:</p> <ul style="list-style-type: none"> 8) Indigenous 9) Black 10) Person of Colour 11) Other racialized groups 12) Neurodiversity 13) Physical disabilities 14) LBGTQ2+ | <p>Recommended Information for criteria:</p> <ul style="list-style-type: none"> • Name and description of client organization; • Description of Work provided; • Timeframe (from to dates); • Reference (Name, phone number and email address for each project. <p>*Note: if above information cannot be provided due to a non-disclosure between resource and client, in Name and Description of Client establish “Project Non-Disclosure Established”</p> |



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| Criterion ID | Mandatory Criteria | Proposal Page # |
|--------------|--|--|
| M6 | Proponent should clearly demonstrate that the Proposed Intermediate Resource has provided EDI & GBA+ training using mainstream EDI & GBA plus curricula for minimum of one (1) training sessions | Information of details of project: <ul style="list-style-type: none">• Name of Client;• Name of Department and/or Private Sector/Tribunal/Non-Profit Organization;• Length of Training;• Material covered in Training. <p>*Note: if above information cannot be provided due to a non-disclosure between resource and client, in Name and Description of Client establish “Project Non-Disclosure Established”</p> |



| | |
|---|---|
| Solicitation No. 84084-21-0046 | Closing Date and Time: November 19, 2021 – 14:00 MST |
| GBA plus & EDI Consulting Services | |

ANNEX "I" to PART 5 OF THE BID SOLICITATION

FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a federally regulated employer being subject to the Employment Equity Act.
- A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
 - A5.1. The Bidder certifies already having a valid and current Agreement to Implement Employment Equity (AIEE) in place with ESDC-Labour.

OR

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

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

OR

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