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Request for Standing Offer

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

Comments :

Issuing Office

Finance and Procurement Branch
 Natural Resources Canada
 1 Challenger Drive
 Dartmouth, Nova Scotia
 B2Y 4A2

Title Provision of Technical Support Services Related to Energy Using Products	
Solicitation No. NRCan-500065794	Date March 18, 2022
Client Reference No. 500065794	
Requisition Reference No. 170178	
Solicitation Closes at 02:00 PM EDT on April 25, 2022	
Address Enquiries to: - Julia Pace julia.pace@nrcan-rncan.gc.ca	Buyer ID BU5
Telephone No. 902-719-4856	Fax No.
Security This Standing Offer does not have a security requirement	
<i>If marked "X" please see the box to the left</i> <input checked="" type="checkbox"/> Acknowledgement copy required	
Destination – of Goods, Services and Construction: Natural Resources Canada 930 Carling Avenue Ottawa, Ontario K1A0Y3	
Vendor/Firm Name and Address Telephone No.: _____ Email : _____	
Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print) _____ _____ Signature Date	



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PART 1 – GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;

Part 3 Offer Preparation Instructions: provides Offerors with instructions on how to prepare their offer to address the evaluation criteria specified;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security and Insurance Requirements: includes specific requirements that must be addressed by Offerors; and

Part 7 7A, Standing Offer, and 7B, Resulting Contract Clauses:

7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;

7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes include:

Annex “A” - Statement of Work

Annex “B” - Basis of Payment

Annex “C” - Primary Resource(s)

Annex “D” - Vendor Performance Evaluation

Annex “E” – Quarterly Usage Report

Annex “F” – Standing Offer Ranking Order

1.2 Summary

The Department of Natural Resources Canada (NRCan), Office of Energy Efficiency (OEE), requires the professional services of qualified consultant (s) for the provision of technical support, research and analysis services on an “as and when requested” basis related to energy using products.

Multiple vendors may be issued a Standing Offer Agreement (SOA) for the following product categories:

1. Appliances
2. Commercial Refrigeration
3. Lighting products
4. Electronics (Consumer Electronics & Office Equipment)
5. Industrial Equipment (electric motors & motor driven & transformers)



6. HVAC (Space heating, space cooling, ventilation, & water heating)
7. Window & door Systems
8. Multi-equipment

The period of the SO shall be for two years with the option to extend the period of the SO for one (1) additional twelve (12) month period.

Up to three (3) Standing Offer Agreements (SOAs) may be issued per product categories under this procurement process (up to 24 SOAs). Offerors may submit a proposal for each category with their offer. If an Offeror submits a proposal for multiple categories, each categories will be evaluated as separate proposals during the technical and financial evaluation process. The proposals that are deemed the highest, second and third highest ranked per category will be recommended for issuance of a Standing Offer Agreement. If an Offeror is being recommended for multiple categories, one Standing Offer Agreement may be issued to the Standing Offer Holder. For example, if an offer is ranked the highest for category 1 and 2, second highest for category 5 and third highest for category 7, the Standing Offer Agreement will be issued for category 1, 2, 5 and 7.

The call-up procedures will be based on the Right of first refusal basis. See part 7, article 7.8 for further details.

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

1.3 Debriefings

After issuance of a standing offer, Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing or by telephone.



PART 2 – OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) 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>) issued by Public Works and Government Services Canada.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting call-ups issued against the Standing Offer, otherwise known as contract(s).

The **2006 (2020-05-28)** Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

- **In the complete text content (except Section 3) Delete: “Public Works and Government Services Canada” and Insert: “Natural Resources Canada.” Delete: “PWGSC” and Insert: “NRCan”**
- **Section 2: Delete: “Suppliers are required to” and Insert: “It is suggested that suppliers”**
- **Subsection 1 of Section 8: Delete entirely**
- **Subsection 2 of Section 8:**
Delete: The only acceptable email address to use with epost Connect for responses to bid solicitation issued by PWGSC headquarters is: tpsgc.dgareceptiondessaoumissions-abbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca, or, if applicable, the email address identified in the bid solicitation. The only acceptable email address to use with epost Connect for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.
Insert: The only acceptable email address to use with epost Connect for responses to bid solicitation issued by NRCan is: procurement-approvisionnement@NRCan-RNCan.gc.ca
- **Under Subsection 2 of Section 20: Not applicable**
- **Sub-Section 5.4 - Submission of Offers of 2006 (2020-05-28) Standard Instructions – Request for Standing Offers – Goods or Services – Competitive Requirements, is amended as follows:**

DELETE: sixty (60) days

INSERT: one hundred and twenty (120) days

2.2 Submission of Offers

Bids must be submitted only to the Natural Resources Canada (NRCan) Bid Receiving Unit specified below by the date and time indicated on page 1 of the bid solicitation.

NRCan Bid Receiving Unit:

Only bids submitted using epost Connect service will be accepted.

At least 48 hours before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open an epost Connect conversation to the following address:

procurement-approvisionnement@NRCan-RNCan.gc.ca

Note: Bids will not be accepted if e-mailed directly to this address. This e-mail address is to be used to open an ePost Connect conversation, as detailed in the Standard Instructions [2003 \(Subsection 2 of Section 08\)](#), or to send bids through an ePost Connect message if the bidder is using its own licensing agreement for ePost Connect.

IMPORTANT: It is requested that you write the bid solicitation number in “Subject” of the email:

NRCan – 500065794 Provision of Technical Support Services



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

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

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

2.3 Enquiries – Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than **three (3)** business days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by Offerors 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 questions or may request that Offerors do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Offerors. Enquiries not submitted in a form that can be distributed to all Offerors may not be answered by Canada.

To comply with the [Code of Conduct for Procurement](#), bidders are obliged to alert the contracting authority to any factual errors that they discover in bid solicitations.

2.4 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Offerors may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their offer, 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 Offerors.



PART 3 – OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

Canada requests that Offerors provide their offer in separately bound sections as follows:

Section I: Technical Offer - 1 electronic copy per Product Category in pdf format

Section II: Financial Offer in a separate file and document – 1 electronic copy per Product Category in pdf format

Section III: Certifications (1 electronic copy)

Section IV: Additional Information (one (1) electronic copy)

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

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

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

Section I: Technical Bid

In their technical offer, offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Appendix 2.

Section III: Certifications

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

Section IV: Additional Information

In Section IV of their bid, bidders should provide:

1. the 1st page of this RFSO signed with their legal name;
2. the name of the contact person (provide also this person's mailing address, phone numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid.



PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

4.1.1 Technical Evaluation

Mandatory and point rating technical evaluation criteria are included in Appendix 1 – Evaluation Criteria.

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit and Price *Per Product category*

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 85 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 144 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. 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.
8. Up to three (3) bidders with the highest combined technical and financial point score will be selected for the award of a standing offer under each product category.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)



		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	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	Pricing Score	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30$
Combined Rating		84.18	73.15	77.70
Overall Rating		1st	3rd	2nd



PART 5 – CERTIFICATIONS

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity [Provisions of the Standard Instructions \(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/25#integrity-provisions\)](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/1/2003/25#integrity-provisions), all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](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.

5.1.2 Additional Certifications Required with the Bid

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.

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: _____

OR

Name of each member of the joint venture:



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

Identification of the administrators/owners:

SURNAME	NAME	TITLE

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

5.2.3 Status and Availability of Resources

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

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

5.2.4 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and



accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

5.2.5 Former Public Servant

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

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive



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

If so, the Bidder must provide the following information:

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

Professional fees	Amount
_____	_____
_____	_____

5.2.6 Aboriginal Designation

Who is eligible?

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

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

OR



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

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

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

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

Signature

Date



PART 6 – SECURITY AND INSURANCE REQUIREMENTS

6.1 Security Requirement

There are no security requirements associated with this requirement.

6.2 Insurance Requirements

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



PART 7 – STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

1.1 The Offeror offers to fulfill the requirement in accordance with the Statement of Work at Annex "A".

7.2 Security Requirement

There is no security requirement applicable to this Standing Offer.

7.3 Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer and resulting contract(s) 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.

7.3.1 General Conditions

[2005 \(2017-06-21\) - General Conditions - Standing Offers - Goods or Services](#), apply to and form part of the Standing Offer.

Section 1 of 2005 (2017-06-21) – Interpretation, should be amended as follows:

DELETE: Public Works and Government Services Canada

INSERT: Natural Resources Canada

7.3.1.2 Supplemental General Conditions

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

[4006 \(2010-08-16\)](#), Contractor to Own Intellectual Property Rights in Foreground Information

7.3.2 Standing Offers Reporting

The Offeror must compile and maintain records on its provision of goods and services to Canada under contracts resulting from the Standing Offer. This data must include all purchases done by Canada, including those acquired and paid for by Canada acquisition cards.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex "C". If some data is not available, the reason must be indicated in the report. If no goods or services are provided during a given period, the Offeror must provide a "nil" report.

The data must be submitted on a quarterly basis to the Standing Offer Authority.

The quarterly reporting periods are defined as follows:

First quarter: April 1 to June 30

Second quarter: July 1 to September 30

Third quarter: October 1 to December 31

Fourth quarter: January 1 to March 31



The data must be submitted to the Standing Offer Authority no later than ten (10) calendar days after the end of the reporting period.

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from date of award to March 31, 2024.

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer up to one(1) additional one (1) year periods under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority before the expiry date of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

7.5 Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority will be:

Name: **Julia Pace**
 Title: Procurement Specialist
 Organization: Natural Resources Canada
 Address: 1 Challenger Drive, Dartmouth, NS
 Telephone: 902-719-4856
 E-mail address: julia.pace@nrcan-rncan.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he/she is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

7.5.2 Project Authority

The Project Authority for the Standing Offer is (*identified in the call-up against the Standing Offer*).

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.5.3 Offeror's Representative

Name: _____
 Title: _____
 Company: _____
 Telephone: _____
 Email: _____



7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is: **Natural Resources Canada**

7.8 Call-up Procedures

Right of first refusal basis:

The call-up procedures require that when a requirement is identified, the identified user will contact the highest-ranked Standing Offer Holder (SOH) to determine if the requirement can be satisfied by that SOH. If the highest-ranked SOH is able to meet the requirement, a call-up is made against its standing offer. If that SOH is unable to meet the requirement, the identified user will contact the next ranked SOH. The identified user will continue and proceed as above until one SOH indicates that it can meet the requirement of the call-up. In other words, call-ups are made based on the "right of first refusal" basis. When the highest-ranked SOH is unable to fulfill the need, the identified user is required to document the file appropriately. The resulting call-ups are considered competitive and the competitive call-up authorities can be used.

For each requirement, the identified user will provide the SO holder with a statement of work (SOW) via email. At minimum the SOW should contain the following information:

- Description of the work
- Estimated Level of Effort
- Location of work
- Etc.

At a minimum, each request for call-up issued will provide the SOH with two (2) business days to submit their proposal. Natural Resources Canada reserves the right to exercise extending the minimum response time based upon the complexity of the requirement. If the highest ranked SOH is not able to submit a proposal, the identified user will move to the next SOH on the list. If an offeror does not respond in the allotted time or the proposal does not address the requirement, NRCan will contact the next SOH.

If the first ranked SOH is unable to meet the deadline of a new call-up requirement as determined by the Technical Authority, NRCan may exercise the right to go to the next ranked SOH. This will only be exercised if the first ranked SOH is not in a position to complete the requirements set forth in the new call-up or has been issued a previous call-up and less than 50% of the work has been completed. The Technical Authority at this point will evaluate the situation and determine if first ranked SOH is or is not able to meet the new call-up deadline.

Note: it will not be necessary to advise the 1st ranked SOH, but the Technical Authority will document the file to clearly show the reason for going to the next ranked SOH. The file must be documented to show the reason and the contract number of the previous contract issued.

The Primary Resource must be used first but if unavailable or if it is deemed necessary, resources from the Additional/Support Staff can be utilized. The allocation of Primary Resource and Additional/Support Staff must be clearly shown on the Quote sent to the Project Authority and in turn clearly shown on the issued Call-up to the Standing Offer contract.



7.8.1 Standing Offer: Vendor Report Card

NRCan will be evaluating the performance of all Standing Offer Holders during the course of **each** awarded Call-up. The performance will be evaluated against Annex "D" – Vendor Report Card, upon completion of each Contract

The purpose of the Vendor Report Card is intended to promote ongoing communications with and acceptable performance from the Standing Offer Holders. The Vendor Report Card is to be used for **each** completed Contract to provide the SO Holder with an assessment of their performance. The SO holder shall have the opportunity to provide comments on their scored performance. At the end of each call-up, the Vendor Report Card will be provided to the SO Holder for their response and the final score attributed by NRCan shall be deemed final, at NRCan's full discretion.

Failure to pass the Vendor Report Card with a score of 8 or higher could result in the SO Holder being penalized for their performance. The Project Authority will assess the Call-up deliverables, as necessary. Such penalties could result in one or more of the following:

- Deny inviting the SO Holder on the next two (2) opportunities, after the first two (2) scores obtained below 8.
- Deny inviting the SO Holder on any future requirements during the full duration of the Standing Offer, including option periods, after the third failed score obtaining below 8.

7.9 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using a call-up against a Standing Offer.

7.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed **\$200,000.00** (Goods and Services Tax or Harmonized Sales Tax included).

7.11 Priority of Documents

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

- a) The Call up Against the Standing Offer, including any annexes;
- b) The Articles of the Standing Offer;
- c) the supplemental general conditions [4006](#) (2010-08-16) - Contractor to Own Intellectual Property Rights in Foreground Information;
- d) The General Conditions [2005](#) (2017-06-21), General Conditions - Standing Offers - Goods or Services
- e) the general conditions [2035](#) (2021-12-02); High Complexity - Services
- f) Annex "A" - Statement of Work;
- g) Annex "B" - Basis of Payment;
- h) Annex "C" – Name of Proposed Resource
- i) Annex "D" – Vendor Report Card
- j) The Offeror's offer dated _____.



7.12 Certifications

7.12.1 Compliance

The continuous compliance with the certifications provided by the Offeror with its offer and the ongoing cooperation in providing associated information are conditions of issuance of the Standing Offer (SO). Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO. If the Offeror does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

7.13 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.



B. Resulting Contract Clauses

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

7.1 Statement of Work

The Contractor must perform the Work described in the call-up against the Standing Offer.

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

[2035](#) (2021-12-02) General Conditions - Professional Services (High Complexity Complexity) apply to and form part of the Contract.

7.3 Term of Contract

7.3.1 Delivery Date

Delivery must be completed in accordance with the call-up against the Standing Offer.

7.4 Proactive Disclosure of Contracts with Former Public Servants

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

7.5 Payment

7.5.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex "B", to a limitation of expenditure of \$ _____ (TBD in resulting call-ups). Customs duties are included, and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable

7.5.2 Limitation of Expenditure

1. Canada's total expenditure to the Standing Offer holder is not expected to exceed \$ _____. Customs duties are included and Applicable Taxes are extra.
2. The Standing Offer holder is to notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.



3. If the notification is for inadequate contract funds, the Standing Offer holder 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.

7.5.3 Method of Payment

Once of the following methods of payment shall be used in each resulting call-up against the SO

SACC Manual clause [H1000C](#) (2008-05-12), Single Payment
SACC Manual clause [H1008C](#) (2008-05-12), Monthly Payment

7.5.4 SACC Manual Clauses

[A2001C](#) (2006-06-16), Foreign Nationals (Foreign Contractor)
[A2000C](#) (2006-06-16), Foreign Nationals (Canadian Contractor)
[C0711C](#) (2008-05-12), Time Verification
[C0705C](#) (2010-01-11), Discretionary Audit

7.6 Invoicing Instructions

Invoices shall be submitted using the following method:

<p>E-mail:</p> <p>Invoicing-Facturation@nrcan-rncan.gc.ca</p> <p>Note: Attach "PDF" file. No other formats will be accepted</p>

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers: Contract number: _____

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

7.7 Insurance

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

7.8 Contract Administration

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



ANNEX A – STATEMENT OF WORK

SW.1.0 TITLE

Provision of Technical Support Services Related to Energy-Using Products

SW.2.0 BACKGROUND

The federal *Energy Efficiency Act* was enacted by Parliament on June 23, 1992. The legislation authorizes the creation of Energy Efficiency Regulations (EER)¹ specifying minimum efficiency performance standards for energy-using products and products that impact energy use. The objective of the EER is to improve the energy performance of equipment used in Canada, to reduce energy use, greenhouse gas (GHG), carbon dioxide, and other atmospheric emissions through the establishment of minimum energy efficiency standards for energy-using products, windows or door systems, and other products that impact energy use (e.g. water-using products). All proposed regulations must include an evaluation of environmental and economic impacts in terms of energy saved and emissions reduced by the proposed minimum energy performance standards, and minimum water performance standards, as relevant.

In the remainder of this document, energy-using products refer to any energy-using products, or products that impact energy use, such as windows, door systems, water-using products, etc. In addition, minimum energy performance standards refer to energy standards, and water standards of specific products, as relevant.

The Equipment Division of the Office of Energy Efficiency (OEE) of NRCan is responsible for developing, amending, and implementing the EER; as well as for managing the EnerGuide and ENERGY STAR labelling programs.²

Manufacturers and distributors of energy-using products support an integrated American and Canadian market, as it allows for a coordinated approach for marketing and distributing products in both countries. Alignment of standards for energy-using products in both countries is crucial for the industry and stakeholders. The alignment of standards removes unnecessary burden for manufacturers with respect to testing, labelling, and meeting the minimum energy performance standards in both countries; in addition, it is a strong driver for regulations in Canada.

In this context, it is important that the successful offerors for this work is aware of issues related to the majority of energy-using products within a product category (as defined below in SW.4.1 and SW 9.0). In addition, it is crucial for the successful offerors to have a thorough knowledge of the industry and stakeholders, and be fully knowledgeable in all aspects of the regulatory environment in Canada and the rulemaking processes in the U.S.

SW.3.0 OBJECTIVES

The Department of Natural Resources Canada (NRCan) requires the professional services of qualified consultant(s) for the provision of technical support, including research and analysis services, related to energy and water-using products, standards development and related regulatory activities in Canada.

To support regulatory development, NRCan requires technical assistance from offerors with sufficient level of expertise of the industry to inform decision-making.

¹ Information regarding the EER is available in the *Guide to Canada's Energy Efficiency Regulations*: <https://www.nrcan.gc.ca/energy-efficiency/energy-efficiency-regulations/guide-canadas-energy-efficiency-regulations/6861>.

² Information regarding these programs is available on the NRCan Website: <http://oee.nrcan.gc.ca/>.



SW.4.0 PROJECT REQUIREMENTS

SW.4.1 SCOPE

Technical support services are required for the following product categories:

1. Appliances
2. Commercial Refrigeration
3. Lighting
4. Electronics (Consumer Electronics & Office)
5. Industrial Equipment
6. Heating, Ventilation and Air Conditioning Equipment
7. Window & Door Systems
8. Multi-Equipment

The energy-using products, within each of the above product categories, are detailed at the end of this document, in SW 9.0

SW.4.2 TASKS AND DELIVERABLES

SW.4.2.1 TASKS

Tasks are listed below and described more fully in the sections that follow.

SW.4.2.1.1 TECHNICAL SUPPORT FOR RELATED PRODUCT CATEGORY

The Standing Offer Holder for product categories listed in SW 9.0 shall perform the work as specified in the Call-up Against the Standing Offer document. The services include the following:

➤ TECHNICAL ANALYSIS

Performing evaluations related to energy-using products or products that affect the use of energy (including existing and emerging technology options):

- Evaluating, modelling, and comparing operating and energy performance characteristics of products.
- Estimating the embedded energy of products.
- Evaluating and recommending changes to test procedures.
- Analysis of statistics.
- Evaluations of technical feasibility of improving product energy efficiency.
- Energy modelling of products in homes at various building code levels (including the new “step codes”, net zero, etc.)
- Assessing how technology is integrated into a larger system and the resulting operating and efficiency impacts
- Recommending Minimum Energy Performance Standards (MEPS) for energy-using products or products that affect the use of energy.
- Non-energy impacts such as water savings, air quality, reliability, device interoperability, consumer acceptance, ease of use, visual comfort, health effects, etc.
- Developing and implementing data collection strategies and tools.
- Determining product life cycles and duty cycles.



➤ MARKET ANALYSIS

- Gathering and analysing of Canadian market information related to energy-using products or to products that affect the use of energy:
 - Sales, categorized as required.
 - Products.
 - Distribution methods.
 - Manufacturing supply chains
 - Service.
 - Maintenance.
 - Warranty.
- Examining Canadian market trends, barriers, and requirements of various technologies and programs;
- Evaluating whether any specific socio-economic groups or demographics in Canada are disproportionately affected by improving product energy efficiency. This includes the identification and analysis of impacts on consumer choice, availability and economics related to gender, income, race, ethnicity, age, or region.
- Developing market forecast models.

➤ BENCHMARK ANALYSIS

A benchmark is “a standard by which something can be measured or judged.” Benchmark models are the points against which the impact of regulations on the market can be measured. Benchmark analysis requires but is not limited to the following:

- Understanding and applying specific NRCan benchmarking methodology.
- Identifying and selecting specific characteristics of the product to perform the benchmark analysis (type, size, capacity, etc.).
- Performing economic and environmental analysis (see below).

➤ ECONOMIC ANALYSIS

Performing economic analysis related to energy-using products or to products that affect the use of energy (including existing and emerging technology options):

- Providing information on incremental costs and pricing associated with equipment energy efficiency improvements.
- Performing cost benefit analyses.
- Identifying potential areas for cost reductions.
- Analyzing large amounts of raw data.
- Developing impact assessments.

➤ ENVIRONMENTAL ANALYSIS

- Evaluating potential impacts due to proposed and future regulations under the current Energy Efficiency Act, or proposed changes to current regulations under that Act;



- Conducting environmental reviews of the product's impact on the environment in comparison with substitutable alternative technologies.

➤ **MARKET COMPLIANCE ANALYSIS**

Assessing conformity of products on the market against the current and proposed standards efficiency levels.

➤ **REGULATIONS AND STANDARDS ACTIVITIES AND PROGRAM DEVELOPMENT**

- Providing advice, identifying opportunities for improvement, and making recommendations for changes related to standards for energy-using products or for products that affect the use of energy in Canada; and Canada's current, or potential future regulations under the Energy Efficiency Act in general;
- Providing advice, identifying opportunity for improvement, and making recommendations for changes related to NRCan's energy efficiency labelling programs for products (ENERGY STAR and EnerGuide);
- Performing analysis and evaluations of international activities related to energy-using products or products that affect the use of energy to identify areas in which NRCan could improve the effectiveness of current and potential future regulations under the Energy Efficiency Act, and their related standards;
- Performing analysis and evaluation of regulatory compliance strategies;
- Examining opportunities for co-operation with manufacturers, standards organizations, consumers and others.

➤ **RESEARCH AND REPORTING**

Providing research and reporting services:

- Gathering data related to the Canadian market and stakeholders.
- Reviewing existing literature.
- Preparing project reports.
- Preparing conclusions and recommendations.

➤ **PRESENTATION OF INFORMATION**

- Presenting information to NRCan Technical Authorities, other federal government officials, and non-government officials related to energy efficiency of equipment and systems issues;
- Participating in telephone conference calls; and, online webinars or in person, if required;
- Preparing information documents related to energy-using products using a style appropriate to the targeted group (e.g., general public, experts in the field).

➤ **OTHER SERVICES**

Other services required for this work include:

- conducting or updating market analyses of energy-using products or of products that affect the use of energy;



- providing advice on technical and regulatory issues related to the product categories listed in the scope above;
- analyzing and comparing existing or proposed test procedures and standards related to energy-using products or to products that affect the use of energy in Canada, North America, and other national and international jurisdictions;
- conducting energy efficiency studies for energy-using products or for products that affect the use of energy;
- conducting economic, socio-economic, and environmental impact assessments associated with establishing higher energy efficiency levels for energy-using products or for products that affect the use of energy;
- conducting opportunity assessments for energy-using products or for products that affect the use of energy by identifying candidate products and estimating their energy savings potential;
- researching, describing, and assessing the risks to the supply and commercial logistics chains on which the markets for energy-using products or for products that affect the use of energy depend;
- analyzing assessments of energy-using products or products that affect the use of energy from other jurisdictions and using their results to draw conclusions about the Canadian context;
- conducting research and collecting information about energy use and energy-using products or products that affect the use of energy.

SW.4.2.2 DELIVERABLES

Deliverables may include:

- 1) analytical reports;
- 2) draft reports;
- 3) progress reports;
- 4) final reports;
- 5) data and information questionnaires;
- 6) electronic spreadsheets;
- 7) databases;
- 8) summaries or policy briefs; and
- 9) presentations.

SW.4.3 REPORTING REQUIREMENTS

The Primary Resource will be responsible for approving and signing off on all data, methodologies, calculations, reports, and revisions submitted under this contract, as well as ensuring:

- the project is completed on time and within budget, as per the approved Call-up against the Standing Offer; and
- the project's resource requirements have been established, objectives have been clearly determined, and tasks are properly assigned to qualified staff.

Other responsibilities of the Primary Resource may include:

- Act as the main point of contact for the Technical Authority;
- Develop and maintain a detailed project plan, timetable and ensure business continuity;
- Lead and manage the project team;
- Plan and coordinate the activities of the project including assigned work, financial, planning and contracting aspects;



- Record, manage, and resolve project issues;
- Prepare and submit reports to the Technical Authority; and
- Participate in project meetings.

SW.5.0 METHOD AND SOURCE OF ACCEPTANCE

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.

SW.5.1.1 SPECIFICATIONS AND STANDARDS

All reports prepared shall be submitted by e-mail in MS Word format to the Technical Authority. If visual presentations are required (see PRESENTATION OF INFORMATION under SW.4.2), then these presentations shall use the MS Powerpoint format. In addition, all calculations and data sheets must be provided in MS Excel format. If the report contains confidential information, then a non-confidential version shall also be provided.

SW.5.1.2 ACCESSABILITY

The Government of Canada is committed to assuring that goods and services purchased by the Government of Canada are inclusive by design and available by default, in accordance with the Canadian Accessibility Act, its regulations and related standards, and the Treasury Board Contracting Policy.

Therefore, common accessibility software must be facilitated in the deliverables, mainly by observing the following:

- Non-text content should have alternative text describing the visual and what it communicates.
- Tables specify column header information.
- All sections have meaningful names.
- All slides have titles (as applicable)
- Cells in excel worksheets don't use red-only formatting to signify negative numbers.
- Document access is not restricted, so accessibility software are not prevented from functioning.

SW.5.1.3 OTHER TERMS AND CONDITIONS

SW.5.1.4 REQUIREMENT – PRIMARY RESOURCE (TECHNICAL SUPPORT)

For each product category listed in SW.4.1 for which a bid is made, the Offeror must propose a qualified Primary Resource in the role of “Technical Support” to conduct the work. Additional resources may be used to perform a portion of the work under the direction of the Primary Resource.

SW.5.2 LANGUAGE OF WORK

Services shall be provided in English.

SW.8.3 NRCAN'S OBLIGATIONS

In support of the Contractor's work under this Standing Offer, NRCAN shall:

- provide relevant data or information that is held by NRCAN and available to be shared to the Contractor for the purposes of the work under this Standing Offer.



- provide access to an NRCAN staff member who will be available to help coordinate activities that involve NRCAN,
- provide comments on draft deliverables within ten(10 working days) where applicable, and/or,
- provide other reasonable assistance or support.

SW.8.4 OFFEROR'S OBLIGATIONS

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

- keep all documents and proprietary information confidential;
- return all materials belonging to NRCAN upon completion of the Contract;
- attend meeting with stakeholders, if necessary;
- participate in teleconferences, as needed; and/or,
- attend meetings at NRCAN sites, if required and permitted by public health measures.

SW.8.4.1 NRCAN SCIENTIFIC INTEGRITY POLICY

In satisfying the requirements of this agreement, the Recipient is encouraged to comply with the provisions and intent of the NRCAN Scientific Integrity Policy (SIP) and to discharge its contractual obligations in support of research, science, or related activities in a manner consistent with all relevant NRCAN SIP provisions. For more information on the Scientific Integrity Policy, please visit the NRCAN website at: <https://www.nrcan.gc.ca/scientific-integrity/21665#a20>

SW.9.0 RELEVANT ENERGY-USING PRODUCTS

1. Appliances

- Clothes Washers (residential & commercial)
- Clothes dryers (residential & commercial)
- Heat-pump dryers
- Integrated washer/dryers (residential & commercial)
- Ranges (electric, gas)
- Microwaves ovens
- Refrigerators including refrigerator-freezers
- Wine Coolers
- Hybrid Wine Coolers/Refrigerators/Freezers
- Freezers
- Dishwashers
- Dehumidifiers (portable and whole house)
- Hot Tubs
- Bottled-water coolers
- Ceiling fan airflow
- Air cleaners/purifiers
- Any other relevant product or system

2. Commercial Refrigeration & Food Service Equipment

- Icemakers
- Vending Machines
- Refrigeration Compressors
- Commercial refrigeration equipment
- Walk-in coolers/freezers



Pre-rinse-spray valves

Commercial food service equipment (e.g., oven, dishwasher, grill, steamer, broiler, warmer, etc.)

Any other relevant product or system

3. Lighting

Fluorescent lamps and ballasts

General Service and directional lamps

Ceiling fan light kits

Torchieres

High intensity discharge lamps and ballasts

Roadway, security lighting and signage

Fixtures (residential/commercial)

Decorative light strings

Lighting controls

UV purification lamps

Any other relevant product or system

4. Electronics (Consumer Electronics & Office)

Audio and video products

Game consoles

TV/VCR/DVD and all combinations of these

Set-top boxes and digital TV adapters

Cordless telephones

Power supplies and battery chargers

Computers/monitors

Cordless telephones / answering machines

Imaging equipment (photocopiers / printers / fax machines / scanners and combinations of these)

Multifunctional devices

Small network equipment (routers, switches and integrated access devices)

Any other relevant product or system

5. Industrial Equipment

Electric motors and motor systems

Variable speed drives and system controls

Pumps & circulators and associated pumping systems

Compressors (air/gas) and systems

Industrial and commercial fans and blowers

Transformers

Medical imaging equipment

Any other relevant product or system

6. Heating, Ventilation and Air Conditioning Equipment

Residential and commercial furnaces (gas, oil, electric)

Residential and commercial boilers (gas-fired, oil-fired, electric)

Combination water and space heating equipment

Integrated mechanical systems

Direct heating equipment (room, unit, infrared heaters, wall furnaces)

Gas fireplaces



Residential and commercial fans (bathroom fans, range hoods etc.)
Heat recovery/energy recovery ventilators
Residential and commercial air conditioners
Roof-top units (make-up air units, dedicated outdoor air systems, etc.)
Micro-cogeneration units
Residential and commercial heat pumps (gas and electric)
Chillers
Water loop and ground water heat pumps
Fixtures & distribution systems (air and water)
Water heaters (gas, oil, electric)
Heat pump water heaters (gas and electric)
Thermostats (line-voltage, low voltage, including connected, adaptive and/or 'smart')
Any other relevant product or system

7. Envelope and fenestration assemblies and systems

Windows
Sliding glass doors
Entry door systems
Skylights
Computer modeling of window and door systems
Any other relevant product or system

8. Multi-Equipment

Standby
Network standby
Network connected devices (smart lamps, smart TV's etc.)
Any other cross-cutting issues relating to more than one category from categories 1 to 7 above.



ANNEX B – BASIS OF PAYMENT

(to be completed at SO award)



ANNEX C – PRIMARY RESOURCE(S)

(To be completed at Standing Offer award)

Technical Support Services Related to Energy Using Equipment

Product Category	Name of Proposed Resource
Appliance	
Commercial Refrigeration	
Lighting Products	
Electronics (Consumer Electronics & Office)	
Industrial Equipment	
Heating, Ventilation and Air Conditioning Equipment	
Window and Door Systems	
Multi-Equipment	



ANNEX D – VENDOR REPORT CARD

Report Card For Contracts awarded under the Provision of Technical Support Services Related Energy Using Products for the Department Individual Standing Offer

Name of Project:
Contract Number:
Name of Supplier:
Name of Person Completing Form:
Title of Person Completing the Form
Date of Completion of Form:
Subject of Form (e.g., specific deliverable; project)

This Report Card is to be used for **each** contract that fails to meet the minimum performance acceptability criteria required in order to provide the Standing Offer (SO) Holder with an assessment on their performance. The SO Holder shall have the opportunity to provide comments on their scored performance. At the end of the contract, the Report Card will be provided to the SA Holder for their response and the final score attributed by NRCan shall be deemed final, at NRCan’s full discretion.

A score of eight (8) out of twelve (12) is the minimum an SO Holder must obtain to pass. If an SO Holder obtains a failed score on their Report Card, NRCan reserves the right to deny inviting the SA Holder on the next two (2) opportunities. If an SO Holder obtains a second fail, NRCan reserves the right to withdraw their Standing Offer and any future option periods will not be exercised.

Criteria	Definitions	Score
Communication	Definition: <i>Communications with Strategic Evaluation, Program Officials and Interviewees are professional (e.g., clear, courteous and businesslike).</i>	
	1 Point - Not professional	
	2 Points - Mostly professional.	
	3 Points - Consistently professional.	
	Comments:	
Content	Definition: <i>The content of the deliverables is technically accurate and comprehensive.</i>	
	2 Point - Lacks detail and clarity, contains technical inaccuracies, several statements are not substantiated and many questions are raised that require clarification or adjustments. (i.e.: many grammar, spelling and formatting errors)	
	4 Points - Raises a few questions that require minor clarification or adjustments (i.e.: a few grammar, spelling and/or formatting errors).	
	6 Points - Concise, technically accurate, adequate level of detail, easily understood and contains no errors.	
	Comments:	



Punctuality	Definition: <i>The deliverables are provided according to the established timelines</i>	
	1 Point - Not provided within the timelines and notice was not provided and agreed to prior to the due dates.	
	2 Points - Not provided within the timelines but valid justification(s) and request(s) for extension(s) received and agreed to in advance.	
	3 Points - Provided within the timelines.	
	Comments:	
Total Score Available		12
Total Score Obtained		



ANNEX E - QUARTERLY USAGE REPORT

(to be completed at SO award)



ANNEX F – STANDING OFFER RANKING ORDER

(to be completed at SO award)



APPENDIX 1 - EVALUATION CRITERIA

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

Offerors are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan's assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from Offerors.

Offerors 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 Offeror 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.

Offerors 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.

NOTE: Each of the eight (8) Product Categories will be evaluated individually; therefore, when submitting your proposal, clearly indicate the name of the Product Category within the document name.

1. Technical Criteria

1.1 Mandatory 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.

Req. ID	Mandatory Requirement	Page #	Pass/Fail	Comments
M1	The Offeror MUST submit the name of the Primary Resource proposed for each identified Product Category for which a proposal is made with a copy of their current CV.			
M2	The Offeror's proposed Primary Resource for each Product Category for which a proposal is made MUST have a: a) post-secondary degree in Engineering or Science from a recognized Canadian university, or the equivalent as established by a recognized Canadian academic credentials service* if obtained outside Canada, AND five (5) years of experience** in the area of energy efficiency of the Product Category for which the proposal is made AND this experience has been gained in the last 10 years prior to the bid closing date; OR			



Req. ID	Mandatory Requirement	Page #	Pass/Fail	Comments
	<p>b) post-secondary diploma or certificate in Engineering Technology from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials service* if obtained outside Canada, AND eight (8) years of experience** in the area of energy efficiency of the Product Category for which the proposal is made AND this experience has been gained in the last 10 years prior to the bid closing date;</p> <p>*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: http://www.cicic.ca/indexe.stm</p> <p>** the proposal should explicitly show where (organization) and when (month/year to month/year) the experience was gained, and explain how that experience is related to the Product Category.</p>			
M3	<p>For each submitted Product Category, the Offeror MUST submit two (2) recent* technical or market analysis** reports, with each report pertaining to different products in the identified Product Category and managed by the Offeror's proposed Primary Resource.</p> <p>In the case of the Heating Ventilation and Air Conditioning Product Category only, the two (2) reports must cover two of the following products: water heating products, space heating products, and space cooling products.</p> <p>* Recent means within the past five years from the bid solicitation date. **A market analysis report collects data, analyzes data and information, and synthesizes conclusions and forecasts to characterize the energy, economic, and environmental impacts of current and potential future policies, programs, or projects.</p>			

1.2 Evaluation of rated criteria

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all of the mandatory criteria.

Proposals must achieve the stated minimum points required overall for the rated criteria to be assessed as responsive under the point rated technical criteria section; proposals not meeting the minimum required points will be deemed non-responsive.

Proposals will be evaluated based on the following criteria:

Req ID.	Rated Requirement	Evaluation Criteria Scoring Method	Maximum Points Available	Minimum Points	Bidder Score	Proposal Page #	Comments
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<p>R1</p>	<p>Participation in U.S. rulemaking process (Offeror or proposed Primary Resource)</p> <p>The Offeror should provide proof of the Offeror or the proposed Primary Resource having participated in the U.S. Department of Energy's Appliance and Equipment Standards rulemaking processes related to the Product Category during the past 10 years prior to the bid closing date..</p> <ul style="list-style-type: none"> As an example, this proof of participation could be registration for participation in meetings, public meetings, teleconferences/WebEx, meeting minutes, etc. <p>The Offeror should also specify the nature of, and provide documentation demonstrating, the Offeror's or the proposed Primary Resource's role in these processes. Active participation should be demonstrated and may include performing analyses, presenting information, etc.</p>	<p>A maximum of 16 points will be awarded.</p> <ul style="list-style-type: none"> 1 point will be awarded for each rulemaking process (to a maximum of 8 points) 1 additional point will be awarded with evidence of active participation in each process (to a maximum of 8 points) <p>Note: A minimum of 4 points is required in each of the Appliance Lighting Electronics Product Categories</p>	<p>(1x8)+ (1x8)=16</p>	<p>4 4 4</p>			
<p>R2</p>	<p>Project Management (Offeror)</p> <p>The Offeror should provide a description of two (2) recent projects within the last 7 years planned and managed by the Offeror.</p> <p>To have your bid properly evaluated, please provide:</p> <p>i) Project title, client name, and industry sector;</p> <p>ii) Planned and actual dollar values. If budget overruns were incurred, then please provide an explanation of the reasons why;</p> <p>iii) Planned start and finish dates and actual start and finish dates with month and year as accurately as possible. If delays were incurred, then please provide an explanation of the reasons why;</p>	<p>A maximum of 6 points per project description will be awarded. Points will be awarded according to the breakdown below:</p> <ul style="list-style-type: none"> Time management <ul style="list-style-type: none"> Project completed on time (3 points) Project completed past original deadline with verifiable and reasonable explanation (2 points) Project completed past original deadline but within 20% of original deadline without verifiable explanation (1 point) Project completed over original deadline and more than 20% overdue without verifiable explanation (0 points) Budget management <ul style="list-style-type: none"> Project completed on budget (3 points) 	<p>2 x 6 = 12</p>				



	<p>iv) Name of one (1) client contact that is able to validate this information.</p> <p>NRCan only commits to reading the first two (2) pages; hence, it is recommended that your report not exceed 2 pages.</p>	<ul style="list-style-type: none"> ○ Project completed over original budget by no more than 10% and with a verifiable explanation (2 points) ○ Project completed over original budget by no more than 20% but no less than 10%, and with a verifiable explanation (1 point) ○ Project completed over original budget greater than 20% without verifiable explanation (0 points) 				
R3	<p>Project Experience (Offeror)</p> <p>The Offeror should provide a summary of two (2) projects planned and managed by the Offeror. The Offeror must have completed these projects during the 10 years prior to the closing date of the bid.</p> <p>Each project summary should describe the project and include:</p> <ul style="list-style-type: none"> - The nature of the services provided; - a statement of which Product Category the project relates to; - Project objectives; - Topics addressed; and - How the project relates to energy efficiency. <p>Please provide the following information as well:</p> <ul style="list-style-type: none"> - Project title, client name, and industry sector; - The name of one (1) client contact able to validate the information above. <p>NRCan only commits to reading the first two (2) pages; hence, it is recommended that your report not exceed 2 pages.</p>	<p>A maximum of 10 points per project description will be awarded. Points will be awarded according to the breakdown below:</p> <ul style="list-style-type: none"> • Relevancy of project <ul style="list-style-type: none"> ○ The project addresses the identified Product Category in an energy efficiency context that is directly related to one or more of the services described in 4.2.1.1 of the Statement of Work (10 points) ○ The project is directly related to energy efficiency and related to the Product Category, but its objectives are not related to one or more of the services (7.5 points) ○ The project addresses a product in the Product Category, but in a non-energy efficiency context (5 points) ○ The project is directly related to energy efficiency, but not related to the Product Category and its objectives are not related to any services described in 4.2.1.1 of the Statement of Work (2.5 points) ○ The project is not directly related to the Product Category or energy efficiency (0 points) 	2 x 10 = 20			
R4	<p>Knowledge of the Regulatory and Standards Development Process in a Canadian Context (Offeror or proposed Primary Resource)</p>	<p>For items a) to d), a maximum of 3 points each will be awarded based on the following criteria:</p> <ul style="list-style-type: none"> • Excellent: the description states the question or subject at hand, presents all the relevant elements in a logical sequence, identifies, describes and 	18			



	<p>The Offeror should demonstrate knowledge of current regional, national and international activities related to the Product Category for which an offer is made.</p> <p>In an essay format, the Offeror should answer the following:</p> <ol style="list-style-type: none"> Describe the process for development of Canadian test standards led by an accredited standards development organization. Describe the process for development of Canadian energy efficiency regulations. For the identified Product Category, identify and discuss Canadian market barriers to more energy efficient products as well as product and market trends. Provide an overview of another energy efficiency program or regulatory process, at the regional, national, or international level, which has an impact on the Canadian market for the identified Product Category. Provide an overview of the Canadian market for the identified Product Category, and identify approaches used to determine product costs, shipments and sales figures. <p>The combined essay should not exceed three (3) pages and it should clearly identify the questions being addressed.</p>	<p>substantiates novel relationships between elements, describes the consequences of the elements and their relationships, and evaluates the evidence with discipline and good judgement (3 points);</p> <ul style="list-style-type: none"> Good: the description states the question or subject at hand, presents some relevant elements, identifies and substantiates relationships between elements, and describes the consequences of those relationships and elements. (2 points); Limited: the description states the question or subject at hand, presents some relevant and irrelevant elements, and describes in a limited way the consequences of those relationships and elements. The description is unclear and the information does not work together well to address the subject (1 point); Poor: the description does not address the question or is seriously inaccurate (0 points) <p>For item e), a maximum of 6 points will be awarded based on the following criteria:</p> <ul style="list-style-type: none"> Excellent: the overview states the question or subject at hand, presents all the relevant elements in a logical sequence, identifies, describes and substantiates novel relationships between elements, describes the consequences of the elements and their relationships, and evaluates the evidence with discipline and good judgement (6 points); Good: the description states the question or subject at hand, presents some relevant elements, identifies and substantiates relationships between elements, and describes the consequences of those relationships and elements. (4 points); Limited: the description states the question or subject at hand, presents some relevant and irrelevant elements, and describes in a limited way the consequences of those relationships and elements. The description is unclear and the information does not work together well to address 					
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		<p>the subject (2 points);</p> <ul style="list-style-type: none"> • Poor: the overview does not address the question or is entirely inaccurate (0 points) 				
R5	<p>Project Experience (proposed Primary Resource)</p> <p>The Offeror should provide a description of one (1) project related to energy efficiency, in which the proposed Primary Resource participated as lead technical expert. This project must have been completed during the last 10 years prior to the closing date of the bid.</p> <p>The project summary should describe the project and include:</p> <ul style="list-style-type: none"> - The nature of services provided; - a statement of which Product Category the project relates to; - Project objectives; - Topics addressed; - How the project relates to energy efficiency as well as equipment standards and labeling; - Details on the approach and methodology used to achieve the project goals. <p>In addition, it is requested that the project summary include the following information:</p> <ul style="list-style-type: none"> - Project title, client name, and industry sector; - Role of the proposed Primary Resource; - Name of one (1) client contact able to validate the information above. <p>The project description should not exceed two (2) pages.</p>	<p>A maximum of 24 points will be awarded as per the breakdown below:</p> <ul style="list-style-type: none"> • Relevancy of project (12 points) <ul style="list-style-type: none"> ○ The project addresses the identified Product Category in an energy efficient equipment standards and labelling context (such as minimum energy performance requirements to support the development of regulations or labelling or voluntary programs). (12 points) ○ The project addresses the identified Product Category in an energy efficiency context. (9 points) ○ The project addresses a product in the identified category, in a non-energy efficiency context. (6 points) ○ The project is indirectly related to the Product Category and or energy efficiency. (3 points) ○ The project is not directly related to the Product Category or does not address energy efficiency. (0 points) • Approach (12 points) <ul style="list-style-type: none"> ○ Excellent: well-structured and logical approach to meet the project objectives (12 points); ○ Good: reasonable structure and linkage with project objectives (9 points) ○ Acceptable: generally meets project objectives but approach not clear (6 points) ○ Limited: unclear approach with limited links to the project objectives (3 points); ○ Poor: not addressed or not acceptable (0 points) 	24			
R6	<p>Technical Experience (proposed Primary Resource)</p>	<p>For each area of expertise, a maximum of 3 points will be awarded based on the following criteria:</p> <ul style="list-style-type: none"> • The proposed Primary Resource demonstrated 	10 x 3 = 30			



	<p>The Offeror should provide a description outlining the proposed Primary Resource's experience in the following areas of expertise, which are described in SW.4.2.1.1 of Annex A in the Statement of Work:</p> <ul style="list-style-type: none"> ➤ Technical analysis; ➤ Market analysis; ➤ Benchmark analysis; ➤ Economic analysis; ➤ Environmental analysis; ➤ Market compliance; ➤ Regulatory and Standards activities; ➤ Program development; ➤ Research and reporting; and ➤ Presentation of information <p>The Bidder should also accompany each description with the approximate cumulative span of time during which the Primary Resource acquired the expertise (from month/year to month/year).</p> <p>The combined descriptions should preferably not exceed two (2) pages.</p>	<p>*significant experience in the area of expertise (3 points)</p> <ul style="list-style-type: none"> • The proposed Primary Resource demonstrated **moderate experience in the area of expertise (2 points) • The proposed Primary Resource demonstrated ***some experience in the area of expertise (1 points) • The proposed Primary Resource did not demonstrate experience in the area of expertise (0 points) <p>* Significant experience is defined as the depth and breadth of experience normally associated with the performance of those duties for a period of three (3) years or more.</p> <p>** Moderate experience is defined as less than three years but more than two years or in a limited role or capacity.</p> <p>*** Some experience is defined as less than two years but more than one year or in a limited role or capacity.</p>					
<p>R7</p>	<p>Report Writing (proposed Primary Resource)</p> <p>The Offeror's Primary Resource should be able to write and present reports effectively.</p> <p>As outlined in M3, the Bidder must provide two reports authored by the proposed Primary Resource.</p> <p>The quality of the submitted projects will be rated based the following criteria:</p> <ul style="list-style-type: none"> a) Concise and effective writing; b) Spelling and grammar; and c) Quality of data presentation. 	<p>A maximum of 7 points per report will be awarded. Points will be awarded according to the breakdown below:</p> <ul style="list-style-type: none"> • Concise and effective writing (2 points): <ul style="list-style-type: none"> ○ Excellent: explains detailed and complex concepts in a manner that is concise, organized, and well understood (2 points) ○ Good: explains detailed and complex concepts in a manner that takes effort and additional time to understand 1 point) ○ Poor: explains detailed and complex concepts in a vague and confusing manner, with poor organization (0 points) • Spelling and grammar (2 points): <ul style="list-style-type: none"> ○ 5 or fewer spelling and grammar mistakes occurring within the span of *any 10 or 	<p>2 x 7 = 14</p>				



		<p>fewer pages (2 points)</p> <ul style="list-style-type: none"> ○ 6 to 9 spelling and grammar mistakes occurring within the span of *any 10 or fewer pages (1 point) ○ 10 or more spelling and grammar mistakes occurring within the span of *any 10 or fewer pages (0 points) <p>* “any” set of pages, in this context, is defined as pages chosen to be evaluated by the individual members of the bid evaluation team.</p> <ul style="list-style-type: none"> ● Data presentation (3 points) <ul style="list-style-type: none"> ○ Excellent: data is presented clearly and visually through charts, tables, and graphs, with clear interpretation and proper sources (3 points) ○ Good: data is presented through charts, tables, and graphs, with adequate interpretation and limited sources: unclear approach with limited links to the project objectives (2 points) ○ Limited: data is presented through charts, tables and graphs, with inadequate interpretation and limited sources (1 point) ○ Poor: data is not presented through charts, tables, and graphs, is poorly interpreted, and not always referenced (0 points) 					
<p>R8</p>	<p>Participation in Committees and Associations (Offeror or proposed Primary Resource)</p> <p>The Offeror should demonstrate its or the Primary Resource’s membership in committees, councils, associations, or any other organizations related to the Product Category or energy efficiency.</p> <p>The Offeror should also specify the nature, and provide documentation for, the Bidder’s or the proposed Primary Resource’s participation in standards development activities.</p>	<p>A maximum of 10 points will be awarded as per the breakdown below:</p> <ul style="list-style-type: none"> ● Either the Offeror or the proposed Primary Resource is a member of a relevant organization <u>and participates</u> in standards development activities (10 points). ● Either the Offeror or the proposed Primary Resource is a member of a relevant organization <u>but neither</u> participates in standards development activities (5 points). 	<p>10</p>				



	<p>As an example, relevant organizations are the Canadian Standards Association (CSA), American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE), International Illumination Engineering Society (IES), International Electrotechnical Commission (IEC) or Consortium for Energy Efficiency (CEE) committees would be acceptable, provided they are committees related to the Product Category.</p>	<ul style="list-style-type: none">Neither the Bidder nor the proposed Primary Resource is a member of a relevant organization (0 points).					
Bidder must obtain a minimum score of 85 points to be considered responsive			144				



APPENDIX 2 - FINANCIAL PROPOSAL FORM

1. Firm Price

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

Offerors should submit a Financial Offer in response to this RFSO for the Product categories listed below. **The following price table will be used to perform the financial evaluation for each product category.**

The total bid price per product category will be calculated by multiplying the per diem rate of the specific category by the estimated usage and summing the value. Calculation for the specific category will be applied to each term and all periods will be totalled to determine the total evaluated bid price of the Proposal for the specific category.

Table A – Primary Resource

Product Category	Per Diem Rate per Product Category				Total Bid Price
	Proposed Period of the Standing Offer Agreement				
	Initial Period Contact award date to March 31, 2024.	Total Est. Days*	Option Period (12 months)	Total Est. Days*	(A x B) + (C x D) =
	(A)	(B)	(C)	(D)	(E)
1. Appliances	\$ ____/day	250	\$ ____/day	75	\$ _____
2. Commercial Refrigeration	\$ ____/day	125	\$ ____/day	50	\$ _____
3. Lighting products	\$ ____/day	200	\$ ____/day	75	\$ _____
4. Electronics (Consumer Electronics & Office Equipment)	\$ ____/day	125	\$ ____/day	50	\$ _____
5. Industrial Equipment (electric motors & motor driven & transformers)	\$ ____/day	125	\$ ____/day	50	\$ _____
6. HVAC (Space heating, space cooling, ventilation, & water heating)	\$ ____/day	350	\$ ____/day	150	\$ _____



7. Window & door Systems	\$ ____/day	50	\$ ____/day	25	\$ _____
8 Multi Equipment	\$ ____/day	50	\$ ____/day	25	\$ _____

Note: NRCan reserve the right to correct arithmetical errors based on the per diem rates submitted by the offerors in columns A, C, and E.

* TOTAL ESTIMATED DAYS PRESENTED HEREIN IS USED FOR EVALUATION PURPOSES ONLY AND IT'S NOT A COMMITMENT BY CANADA.

Table B: Additional/Support Staff

Per diem rate offered for Additional/Support Staff, if proposed, must be lower than the per diem rate of the Primary Resource from Table A. This will be not be included in the evaluation process.

Resource Category	Per diem rate
1. Senior Engineer/analyst	\$
2. Engineer/analyst	\$
3. Admin support	\$
4. add more lines as required

FOR ANY ERRORS IN THE CALCULATION, THE DAILY RATE WILL BE UPHELD.