

2022-06-08

CONFIDENTIAL

Standards Council of Canada
55 Metcalfe Street, Suite 600
Ottawa ON K1P 6L5
Canada

**Subject: Request for Proposal (RFP) # 2022-08
Gender Equality and Diversity Inclusion on Canadian boards and senior management**

This document represents an invitation to Bidders to submit their proposals to the Standards Council of Canada (SCC) to work on the development of two (2) deliverables for Gender Equality and Diversity Inclusion on Canadian boards and senior management.

In accordance with the Statement of Work attached hereto as Appendix "B", SCC will issue a contract to the successful Bidder, establishing the pricing and terms / conditions under which the development of the above-mentioned standard will be undertaken.

Proposals must be received by SCC no later than **16:00 hours, (4 p.m.) EDT on Thursday, July 7 2022**. It is the Bidder's responsibility to deliver their proposal prior to the **time/date of bid closing**. Proposals received after 16:00 hours will not be accepted; they will be returned to the sender unopened.

PROPOSALS ARE TO BE SUBMITTED ELECTRONICALLY TO contracts@scc.ca by the time/date of bid closing (including the financial proposal).

1. ATTACHMENT 1 – Technical Proposal

NOTE: No financial information is to be included in ATTACHMENT 1

2. ATTACHMENT 2 – Financial Proposal

Proposals that do not contain the requested documentation or deviate from the required financial format (as per Appendix D of SCC RFP #2022-08) may be considered incomplete and disqualified.

SCC is not obliged to accept the lowest bid and/or any proposal.

Questions with respect to the meaning or intent of this process, or requests for correction to any apparent ambiguity, inconsistency or error in the document must be submitted in writing to contracts@scc.ca and must be received by 12:00 hours (noon) EDT on **Friday, June 24, 2022**. All answers will be communicated to all potential bidders via Buy & Sell.

Request for Proposal # 2022-08

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APPENDIX A: REQUEST FOR PROPOSAL – ACCEPTANCE FORM

Proposal Submitted by

(Name of Company)

(Complete Address)

GST/HST Number _____

Telephone Number: _____

Fax Number: _____

Contact Person: _____

Contact Email Address: _____

1. The Undersigned (hereinafter referred to as “the Bidder”) hereby proposes to the Standards Council of Canada (SCC) to furnish all necessary expertise, supervision, materials, equipment and other incidentals necessary to complete to the entire satisfaction of SCC or their authorized representative, the work described in the Terms of Reference / Statement of Work attached hereto as Appendix “B”.

2. The Bidder hereby proposes to perform and complete the work in accordance with the terms and conditions (at the place and in the manner) specified in:
 - (i) Appendix A - attached and entitled “Request for Proposal – Acceptance Form”;
 - (ii) Appendix B - attached and entitled “Statement of Work”;
 - (iii) Appendix C - attached and entitled “Technical Evaluation Criteria”;
 - (iv) Appendix D - attached and entitled “Financial Template”.

3. **Period of Services**
 - (i) The contract award date is the date that the contract is signed by the Bidder and SCC.
 - (ii) The service start date is the date that the Bidder and SCC agree to commence the work.
 - (iii) The Bidder hereby proposes to perform the work commencing on the service start date and have work completed within the 12 months following this date.

4. Financial Proposal

The Bidder hereby proposes to perform and complete the work as per the financials outlined using Appendix D: Financial Template of SCC RFP #2022-08, which represents the total financial proposal.

5. Optional Modifications

In the event that SCC requests the successful Bidder to proceed with any optional modifications or additional changes to the process, payment for this additional work will be based on the per diem rates quoted (see Appendix D of SCC RFP #2022-08).

Authorization to proceed with additional work will be provided by way of a contract amendment as per the established proposal.

6. Optional Years

SCC may decide, at its discretion, to exercise an option by means of formal contract amendment, to extend the term.

7. Federal Goods and Services Tax (GST) and Harmonized Sales Tax (HST)

The prices and rates quoted as part of the Bidder's proposal are NOT to include any provision for taxes.

8. Payment Schedule

As a result of acceptance of the Bidder's proposal, SCC reserves the right to negotiate an acceptable payment schedule prior to the awarding of a contract and/or any amendments.

9. Appropriate Law

Any contract awarded by SCC as a result of SCC RFP #2022-08 shall be governed by and construed in accordance with the laws in force in the Province of Ontario, Canada.

10. Tender Validity

The Bidder agree(s) that their proposal will remain firm for a period of 90 calendar days after the **the time/date of bid closing**.

Signatures

The Bidder herewith submits this bid in accordance with the requirements specified in the Request for Proposal documents.

SIGNED this _____ day of _____, 2022

Per _____
NAME OF COMPANY

Per _____
(Signing Officer and Position)

APPENDIX B – STATEMENT OF WORK

Statement of Work	
Project	<p>Development of two (2) deliverables for Gender Equality and Diversity Inclusion on Canadian boards and senior management:</p> <ol style="list-style-type: none"> 1. Publicly Available Specification (PAS) that outlines guidance on self-assessment; and 2. Technical Specification (TS) that outlines third-party certification requirements
Background	<p>The Government of Canada, through the Department of Innovation, Science, and Economic Development (ISED) has announced the 50-30 Challenge (“the Challenge”) whereby participating companies and not-for-profits will voluntarily take action to achieve improvements in support of diversity and inclusion within their organizations.</p> <p>The goal of the program is to challenge Canadian organizations to increase representation, participation, and inclusion of diverse groups on corporate boards and/or in senior management.</p> <p>Companies that participate in the challenge, shall work towards:</p> <ul style="list-style-type: none"> • Gender parity (“50%”) on Board(s) and/or senior management, and; • Significant representation (“30%”) on Board(s) and/or senior management of equity-deserving groups, including racialized, Black and/or People of Colour, people living with disabilities and members of the 2SLGBTQ+ community and/or gender and sexually diverse individuals. Participants will also be invited to recognize First Nations, Inuit and Métis peoples’ as founding peoples of Canada and under-represented in positions of economic influence and leadership. <p>As an initial step of this project, SCC contracted the Diversity Institute to deliver a first Publicly Available Specification (PAS) on terms and definitions for the 50/30 Challenge. The PAS was developed through a series of consultations with Canadian stakeholders with the goal of building consensus on the terms and definitions of the 50/30 Challenge and their application.</p> <p>For phase 2 of the work, ISED has identified their certification objectives for the Challenge which will require two distinct deliverables:</p> <ol style="list-style-type: none"> 1. A Publicly Available Specification (PAS) to set the guidance for first-party certification/self-assessment; and 2. A Technical Specification (TS) to set the requirements for third-party certification <p>SCC is seeking one developer for both deliverables. Both deliverables are expected to be developed in parallel and in partnership with SCC.</p> <p>The selected developer will ensure that the process is transparent, consensus-based, and bottom-up. The successful bidder will leverage the PAS titled “<i>The 50-30 Challenge</i>”, as a seed document to inform their work.</p>

<p>Scope</p>	<p><u>Purpose</u></p> <p>The PAS will provide guidance, practices, criterion, and metrics that will help organizations to self-assess the extent to which they have achieved gender equality and significant representation of diverse groups in boards and/or senior management positions while also providing measurement tools for companies working towards that goal.</p> <p>The TS will provide the requirements necessary for certification bodies to assess and certify interested Challenge signatories as compliant with the level of gender equality and significant representation of diverse groups in boards and/or senior management positions outlined in the 50-30 Challenge.</p> <p>Both deliverables provide guidance, indicators and compliance tools to help organizations improve access and increase representation of women and diverse groups. The purpose of these deliverables is to provide the necessary tools and guidance to increase representation and inclusion of diverse groups in leadership roles as well as set out the evaluation methods and compliance levels for participating organizations. The deliverables will be leveraged for both self-assessment and third-party assessments, so the developer shall provide SCC with an implementation strategy for certification.</p> <p><u>Development of the deliverables</u></p> <p>SCC acknowledges the current COVID-19 pandemic has forced the use of virtual/remote activity to ensure development operations can still be carried out. The Supplier will be expected to leverage the new virtual operating environment and available tools to develop the PAS and the TS.</p> <p><u>Timelines</u></p> <p>Work is to begin at the effective date of the contract.</p> <p>The TS shall be developed and published in accordance with the workplan schedule indicated in stage 1 but no later than 12 months after the effective date, simultaneously in English and French.</p> <p>The PAS shall be developed and published in accordance with the workplan schedule indicated in stage 1 but no later than 9 months after the effective date, simultaneously in English and French.</p> <p>Work on the PAS and TS should begin in parallel in an effort to leverage similar stakeholder groups and develop common content, where appropriate.</p> <p><u>Publishing and Distribution</u></p> <p>To reduce the financial burden to stakeholders, the PAS and TS will be made available at no fee for the publication period determined by the maintenance requirement of the PAS and TS Guidelines.</p>
<p>Mandatory Requirements</p>	<p>The SUPPLIER:</p> <ul style="list-style-type: none"> • Shall comply to SCC Requirements and Guidance for National Technical Specifications;

	<ul style="list-style-type: none"> • Shall comply to SCC Requirements and Guidance for Publicly Available Specifications; and • Acknowledges and accepts this statement of work (SOW) and all of the requirements pertaining to deliverables detailed within. <p>Shall make use of and reference the PAS developed by the Diversity Institute titled “<i>The 50-30 Challenge</i>” which brings key terms and definitions as well as recommendations and guidelines to achieve gender equality and greater diversity in leadership roles and positions.</p> <p><u>Reporting Requirements</u></p> <p>The Supplier will also be required to prepare written reports summarizing the progress against specific SCC-required phases in the development of the deliverables. At the final stage of each deliverable, a concise report shall be generated explaining how the technical experts considered gender responsiveness when drafting the requirements.</p> <p>For the identified lifecycle following publication of the deliverables, the Supplier is required to provide SCC annual reporting, including number of visits (to view the PAS and the TS) and number of times the deliverables are accessed (by download or online use) summarized by language of publication.</p>
<p>Tasks/Technical Specifications</p>	<p>Annex A contains detailed requirements about the work that is to be delivered by the SUPPLIER throughout the required Stages 1 through 8 of the TS.</p> <p>End-project deliverable(s) shall constitute the publication of a Technical Specification (TS), simultaneously published in English and French.</p> <p>The SUPPLIER shall:</p> <ul style="list-style-type: none"> • Form a project team with the technical competency to handle the project management, committee management, and other activities as specified in the Deliverables section. The SUPPLIER will also identify at least one substitute (as backup support) with equal or higher technical competence to ensure project completion. • Submit all Contract-related deliverables directly to SCC using the electronic workspace, according to the authorized work plan and schedule or Submit all Contract-related deliverables directly to SCC, by email, according to the authorized work plan and schedule; • Ensure SCC is informed as per the reporting schedule outlined in the Contract; • Manage the technical specification development process and provide support (coordination and communication) to project technical committees in accordance with the applicable SCC Requirements and Guidance for Technical Specifications; • Inform and obtain SCC’s final approval on all joint press release communications; • Provide sufficient notice to SCC to review and approve any public, non-mandated announcements regarding work undertaken in

relation to this project; specifically, the SUPPLIER to provide the following minimum notice to SCC:

- Public Review Strategy (if applicable) – minimum five (5) business days
- SUPPLIER or Joint SUPPLIER-SCC Publication Content – minimum fifteen (15) business days; note that that the timeline is for SCC to approve the SUPPLIER content – with respect to Joint Publications, the publication issuance shall be at SCC’s final determination
- For clarity, public announcements do not include the mandatory announcement required under Stage 3;
- Provide acknowledgement of the contribution of SCC and associated funders, to contribution of the development of the technical specification (including in publication and related announcements);
- Inform and seek authorization from SCC of scope, work plan, budget and/or schedule changes;
- Enable accessibility to the Technical Specification in both official languages.
- TS distribution reporting: For the identified lifecycle following publication of the TS, the Supplier is required to supply SCC annual reporting including number of visits (to view the TS) and number of times the TS is accessed (by download or online use) summarized by language of publication.

Annex B contains detailed requirements about the work that is to be delivered by the SUPPLIER throughout the required Stages of the PAS.

End-project deliverable(s) shall constitute the publication of a Publicly Available Specification (PAS), simultaneously published in English and French.

The SUPPLIER will:

- Submit all Contract-related deliverables directly to SCC, by email or an agreed upon electronic workspace, according to the authorized work plan and schedule;
- Ensure SCC is informed as per the reporting schedule outlined in the Contract;
- Manage the Publicly Available Specification development process and provide support as outlined in the PAS Guidelines;
- Inform and obtain SCC’s final approval on all joint press release communications;
- Provide sufficient notice to SCC to review and approve any public, non-mandated announcements regarding work undertaken in relation to this project; specifically, the SUPPLIER to provide the following minimum notice to SCC:
 - Public Review Strategy (if applicable) – minimum five (5) business days
 - SUPPLIER or Joint SUPPLIER-SCC Publication Content – minimum fifteen (10) business days; note that that the timeline is for SCC to approve the SUPPLIER content – with respect to Joint Publications, the publication issuance shall be at SCC’s final determination

	<ul style="list-style-type: none"> ○ For clarity, public announcements do not include the mandatory announcement required under Stage 5; ● Provide acknowledgement of the contribution of SCC and associated funders, to contribution of the development of the Publicly Available Specification (including in publication and related announcements); ● Inform and seek authorization from SCC of scope, work plan, budget and/or schedule changes; ● Enable accessibility to the Publicly Available Specification; ● PAS distribution reporting: For the identified lifecycle following publication of the PAS, the Supplier is required to supply SCC annual reporting including number of visits (to view the PAS) and number of times the PAS is accessed (by download or online use) summarized by language of publication.
Deliverables	See deliverables tables on the following page.

ANNEX A - DELIVERABLES - TS		
Stages	Requirement	Deliverable
Stage 1: Preliminary (Guidance clause 3.1)	Circumstances for use of a TS: a) an existing National Standard of Canada or international standard is not available b) a fast solution is required c) the subject matter is still under technical development d) another reason precluding immediate publication of a standard	a) Confirmation that at least one circumstance is met.
Stage 2: Initiation (Guidance clauses 3.2, 3.2.1)	New Work Item Proposal a) The SUPPLIER shall document the need for the TS. b) Generate project work plan with clear deliverables and matching timelines for completion, and budget. The work plan shall include consideration of the obligation to make an “active offer” regarding the use of both official language ensuring compliance with the <i>Official Languages Act</i> . c) Conduct a coordination meeting with SCC and project sponsor (if any) d) Revise and confirm appropriate project scope (based on sponsor or stakeholder needs, standard landscape research, intended TS application needs, such as certification)	a) Confirmation that the need has been documented. b) Obtain SCC approval of project work plan and budget. c) Confirmation that the language capacity is in place to ensure that an active offer regarding the use of either of Canada’s official languages is made and that participants can use their official language of choice. d) Confirmation coordination meeting was held. e) Obtain SCC approval of the project scope.
Stage 3: Notice	The SUPPLIER shall inform the public and key stakeholders in both official languages simultaneously,	Confirmation that the notice has been provided to the

ANNEX A - DELIVERABLES - TS		
Stages	Requirement	Deliverable
(Guidance clause 3.2.2)	through its communication channels that it is initiating the development of a TS.	public in both official languages simultaneously.
Stage 4: Committee (Guidance clauses 3.3, 3.3.1)	Technical Experts a) In addition to SCC-identified stakeholders, the SUPPLIER shall identify technical experts in the subject matter of the TS to participate in the drafting process. b) The SUPPLIER shall offer an inclusive, transparent development process and afford the opportunity to participate to any interested stakeholder c) The SUPPLIER shall provide appropriate member orientation to technical committee members, in the language of choice identified by the member d) The SUPPLIER shall utilize a Terms of Reference (ToR), outlining mandate and operations, and provide the ToR to committee members e) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made.	a) Confirmation that the group members are subject matter experts. b) Confirmation that reasonable efforts were undertaken to secure technical experts appropriate to the scope of the TS c) Confirmation that orientation was provided d) Confirmation that ToR were accepted by technical committee members e) Confirmation that an active offer was made regarding the use of both official languages and that members are able to participate in the official language of their choice.
Stage 5: Drafting (Guidance clause 3.3.2)	The identified technical experts shall draft the TS in accordance with the outlined process. Depending on the language preferences of participants voiced when the active offer was made, this may need to be done in both official languages.	Confirmation that the TS was developed by the technical experts and that the language requirements were met.

ANNEX A - DELIVERABLES - TS

Stages	Requirement	Deliverable
	Working with the technical experts, the SUPPLIER will determine if a peer review or public review will be conducted in Stage 6.	
Stage 6: Approval (Guidance clause 3.4)	<p>Technical Approval</p> <p>a) Approval shall be based on consensus by the technical experts or by a vote with a minimum of 2/3 of affirmative votes.</p> <p>The developer shall sign off on the final document to confirm the appropriate process has been followed and the required consultations and peer review have occurred. If one or more members of the group containing the technical subject matter experts and/or interested parties disagree with publishing the final document, the developer shall generate a report justifying the decision to publish.</p> <p>b) Undertake a peer review or public review, as determined in Stage 5. At minimum, a peer review is required. If a public review, it must be conducted in both official languages simultaneously and must be open for a minimum of 3 weeks. Public Review Strategy shall include:</p> <ul style="list-style-type: none"> - Identification of targeted audience. - Outreach efforts. - Additional proactive measures intended to reach out to a wider audience. 	<p>a) Confirmation of approval and the method utilized</p> <p>If one or more members of the group containing the technical subject matter experts and/or interested parties disagree with publishing the final document, confirmation the developer has generated the required report justifying the decision to publish.</p> <p>b) Public review strategy for SCC approval.</p>

ANNEX A - DELIVERABLES - TS

Stages	Requirement	Deliverable
	<p>The SUPPLIER should support the review through proactive identification of targeted stakeholders with notification, any other proactive engagement, such as public forums, etc.</p> <p>c) Sign off by the SUPPLIER confirming appropriate process has been followed.</p> <p>d) If needed, a report justifying the decision to publish shall be drafted.</p>	<p>c) Confirmation that peer or public review has been conducted. If public review was needed, confirmation must include the language and duration requirements.</p> <p>d) Confirmation of sign-off was conducted.</p> <p>e) If needed, confirmation that report was generated.</p>
<p>Stage 7: Publication</p> <p>(Guidance clause 3.5)</p>	<p>a) The SUPPLIER shall publish the TS simultaneously in both of Canada’s official languages.</p> <p>b) Develop and obtain SCC approval for any joint communications, if applicable</p> <p>c) The TS is to be available online at no-cost for the identified lifecycle in downloadable PDF format. The cost displayed for the TS shall be displayed as “\$0.00” or “at no cost” for Canadian IP addresses.</p>	<p>a) Confirmation that the TS has been published in English and French simultaneously.</p> <p>b) Obtain SCC approval for any joint communications</p> <p>c) Confirmation that the TS is available online at no fee.</p>
<p>Stage 8: Maintenance</p> <p>(Guidance clauses 3.6, 3.6.1)</p>	<p>The SUPPLIER shall identify a suitable lifecycle.</p>	<p>Confirmation that a lifecycle has been identified.</p>

ANNEX B - DELIVERABLES - PAS		
Stages	Requirement	Deliverable
<p>Stage1: Preliminary</p> <p>(Guidance clause 4.2)</p>	<p>a) A proposal for a PAS can come from any source, generally from a prospective sponsor. Once a market need has been ascertained, a detailed formal project proposal shall be prepared by the developer for approval by the sponsor, setting out a draft scope for the PAS and identifying the range of services and options that are appropriate, the proposed author of the first draft, and the fee and payment schedule for undertaking the work.</p> <p>b) The proposal shall include appropriate language measures ensuring language legislation is covered. The proposal shall include consideration of the obligation to make an “active offer” regarding the use of both official language measures ensuring compliance with the Official Languages Act.</p> <p>c) Generate project work plan with clear deliverables and matching timelines for completion for approval by SCC ensuring “active offer” languages services are included.</p>	<p>Confirmation from Project Manager:</p> <p>a) that the detailed formal project proposal has been completed</p> <p>b) the project sponsor has approved the project proposal and that the language capacity is in place to ensure that an active offer regarding the use of either of Canada’s official languages is made and that participants can use their official language of choice.</p> <p>c) Obtain SCC approval of project work plan that also includes “active offer” languages services.</p>
<p>Stage 2: Initiation</p> <p>(Guidance clause 4.3)</p>	<p>As a minimum, the developer shall undertake reasonable research to identify:</p> <p>I. national and international standardization documents and projects that may relate to the proposed scope of the PAS project; and</p> <p>II. stakeholders who may have an interest in it. The SUPPLIER shall</p>	

	<p>ensure an “active offer” regarding the use of both official languages is made.</p> <p>a) A report of the findings shall be sent to the sponsor and technical author to inform the preparation of the first draft and the composition of the steering group and review panel. Depending on the language preferences of participants voiced when the active offer was made, this may need to be done in both official languages.</p>	<p>a) Confirmation from Project Manager that the report of findings has been completed and sent to the project sponsor and technical author and that the language requirements were met.</p>
<p>Stage 3: Coordination</p> <p>(Guidance clause 4.5)</p>	<p>a) The developer shall organize a coordination meeting (typically including the developer’s project manager, the representative of the sponsor and the technical author) at which the PAS process and the duties and roles of both the sponsor and the developer within it shall be clearly explained and a draft schedule proposed. The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made.</p> <p>b) The draft scope of the PAS as developed during the inception of the project shall be further discussed and refined at the initial meeting and consideration shall be given to the composition of the steering group and review panel. Depending on the language preferences of participants voiced when the active offer was made, this may need to be done in both official languages.</p>	<p>Confirmation from Project Manager that:</p> <p>a) the meeting was held and that the language requirements were met.</p> <p>b) that the scope was drafted, and the required composition of the steering group and panel was considered and that the language requirements were met.</p>
<p>Stage 4: Notice</p>	<p>a) A public announcement, in both Official Languages, shall be</p>	<p>Confirmation from Project Manager that:</p>

<p>(Guidance clause 4.6.1)</p>	<p>made of the commencement of the project and further details shall be sent directly to all stakeholders identified by the domain research as having a potential interest in the subject matter. The announcement shall include basic details of the project and shall invite stakeholders to engage with the PAS process by taking part in the public consultation and consider nominating appropriate experts as members of the review panel.</p> <p>b) The project announcement is also a means of identifying interest groups who may make a valuable contribution through membership of the steering group.</p>	<p>a) the announcement was made in both official languages at the commencement of the project</p> <p>b) the details were sent directly to all stakeholders identified by the domain research as having a potential interest in the subject matter</p>
<p>Stage 5: Committee</p> <p>(Guidance clause 4.6.2)</p>	<p>a) A steering group shall be created. Typically a steering group has between 8 and 12 members, including the sponsor, the technical author and representatives of organizations identified as being important stakeholders in the project. These may include:</p> <ul style="list-style-type: none"> • industry; • central and local government departments, agencies and other regulatory bodies; • trade associations; • professional bodies; • consumer interests; • testing, certification and accreditation bodies; • academia. <p>b) The sponsor is asked at the initial meeting to identify important stakeholders and provide named contact details if available. The</p>	<p>a) Confirmation from Project Manager that the steering group has been formed appropriately to the subject of the PAS</p>

	<p>developer domain research and PAS announcement to stakeholders are also designed to identify organizations or candidates. To ensure a fair and transparent representation of relevant interests, the ultimate responsibility for the composition of the steering group shall reside with the developer. Steering group meetings are chaired by the project manager.</p> <p>c) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made. Following initial offer, the “active offer” language service shall be offered to any new members that join.</p>	<p>c) Confirmation that the language requirements were met.</p>
<p>5.1 (Guidance clause 4.6.3)</p>	<p>a) A review panel shall be created. The review panel comprises a wider representation of interested parties that are likely to benefit from or be affected by the implementation of the PAS. A panel comprising between 20 and 150 representatives is usual. Members should be drawn from those stakeholders identified by the steering group, informed by the domain research and other types of market engagement.</p> <p>b) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made. Following initial offer, the “active offer” language service shall be offered to any new members that join.</p>	<p>a) Confirmation from the Project Manager that the review panel has been created appropriately to the subject of the PAS.</p> <p>b) Confirmation that the language requirements were met.</p>
<p>Stage 6: Drafting (Guidance clause 4.6.4)</p>	<p>a) The first draft (the “base document”) is usually supplied either by the sponsor or by the technical author. It is usually</p>	<p>a) Confirmation from the Project Manager that:</p> <ul style="list-style-type: none"> • that the GAP analysis has been conducted

	<p>subject to a gap analysis by the project manager to reveal any areas defined by the draft scope that may be missing. After editing and any further necessary reworking, the document shall be submitted to the steering group for consultation. Depending on the language preferences of participants voiced when the active offer was made, this may need to be done in both official languages.</p> <p>b) A review of the comments received leads to the development of a draft that is sufficiently mature to be issued for a wider public consultation.</p>	<ul style="list-style-type: none"> • the draft has been provided to the steering group for consultation • a scope statement has been drafted • the required structure has been followed • that the language requirements were met.
<p>Stage 7: Public Inquiry</p> <p>(Guidance clause 4.6.5)</p>	<p>a) The consultation stage shall last for at least four weeks and is undertaken through an online forum open to the public.</p> <p>b) The stakeholders identified at the public announcement stage shall be notified of the consultation, as well as the members of the review panel. The consultation is a vital stage in validating the draft and therefore a major factor in establishing the authority and credibility of the published PAS.</p> <p>c) The public inquiry shall be conducted simultaneously in both official languages.</p>	<p>Confirmation from the Project Manager that:</p> <p>a) consultation has been conducted</p> <p>b) the identified members of the review panel have been notified</p> <p>c) that the public inquiry was made available simultaneously in both official languages.</p>
<p>Stage 8: Approval & Publication</p> <p>(Guidance clause 4.6.6)</p>	<p>a) Comments arising from the public consultation shall be discussed by the steering group, with the aim of achieving a document underpinned by consensus. Depending on the language</p>	<p>a) Confirmation from Project Manager that:</p> <ul style="list-style-type: none"> • the comments of the consultation have been

	<p>preferences of participants voiced when the active offer was made, this may need to be done in both official languages.</p> <p>b) Prior to publication, the sponsor shall endorse the final draft and provide permission to being publicly associated with the PAS as outlined in the contract. Approval of the PAS shall be based on a simple majority of the steering group. The developer shall publish the PAS, in both official languages simultaneously, promptly and makes it available under reasonable terms and conditions.</p> <p>c) The PAS is to be available online at no-fee for the identified lifecycle in downloadable PDF format. The cost displayed for the PAS shall be displayed as "\$0.00" or "at no fee" for Canadian IP addresses.</p>	<p>addressed by the steering group</p> <ul style="list-style-type: none"> • endorsement from the sponsor • approval by the steering group • that the language requirements were met. <p>b) Confirmation from Project Manager that</p> <ul style="list-style-type: none"> • simultaneous publication in both official languages • a copy of the published PAS shall be provided to SCC for its records. <p>c) Confirmation that the PAS is available online at no fee.</p>
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APPENDIX C – TECHNICAL EVALUATION

Technical Evaluation Process

The technical evaluation for the development of a Publicly Available Specification (PAS) and a Technical Specification (TS) will consist of:

1. A determination of the compliance of each bid with the mandatory requirements stated in phase 1, below.
2. Each proposal that meets the stated mandatory requirements will be evaluated against the point-rated technical selection criteria. Bidders must achieve a minimum score of 70% (70 points of a possible 100 points) for the point-rated technical criteria as stated in phase 2, below. Only proposals meeting these requirements will be considered.
3. In the financial evaluation, tendered prices of the qualified bids will be computed as follows:

$$F = 30 + (21 * (1 + |n|)^{-n})$$

Where,

$$n = (Y - P) / Y$$

P = Bid Price

Y = Internal Budget

The financial evaluation may achieve a maximum score of 30 points

An Evaluation Committee, consisting of at least three (3) SCC or SCC-appointed representatives, will be formed to assess all bids received in response to **SCC RFP# 2022-08**. The committee will be dissolved after the successful completion of their duties in selecting the Bidder with whom SCC will contract for the delivery of the Publicly Available Specification (PAS) and Technical Specification (TS) deliverables.

The technical evaluation for the successful bidder that will lead the development of a PAS and TS will consist of the two (2) phases described below:

4. Phase 1- Evaluation of Mandatory Requirements. This phase will consist of determining compliance of submitted Proposals against mandatory requirements. Proposals meeting all the mandatory requirements will be considered for the second phase. Proposals that do not substantially comply with all mandatory requirements and / or are substantially incomplete, will be disqualified and not evaluated further
5. Phase 2: Evaluation of Point-Rated Criteria. This phase will consist of evaluating the (i) technical and (ii) cost merits of proposals, which meet the stated mandatory requirements, against the point-rated technical selection criteria. Respondents must achieve a minimum score of 70 points (of a possible 100 points) for the point-rated technical criteria, in order to be considered for the point-rated cost criteria, which will evaluate respondents' financial proposal for a maximum of 30 points.

The highest-ranked Respondent will be determined using the highest combined rating of technical merit (70 points) and cost (30 points).

PART A: Evaluation of Mandatory Requirements

Proposals will be assessed by the SCC Evaluation Committee to determine whether they meet mandatory requirements pertaining to:

- The Bidder, and
- The Project Team

The Bidder

Each Bidder submitting a response to **RFP # 2022-08** must demonstrate to the satisfaction of the Evaluation Committee that:

- The Bidder has the competency to develop the deliverables, and the ability to comply to SCC's PAS and TS guidelines, by submitting two (2) copies of previously published standards deliverables or like deliverables (guidance and regulatory documents, policies and procedures and etc.)
- The Bidder must provide examples of technical competency to develop a Technical Specification that provides requirements for third party certification;
- The Bidder must provide examples of technical competency to develop a Publicly Available Specification that provides guidance for first-party assessment/certification;
- The Bidder has the capacity to engage key stakeholders in the Diversity, Equity and Inclusion (DEI) field, as well as to identify and engage any additional experts necessary to ensure language, needs, and challenges are reflected in the development of the two deliverables;
- The Bidder has the capacity to publish the national standards deliverables within the timelines specified.

The Project Team

Each Bidder must agree to the following mandatory requirements for the Project Leadership Team:

- At least three (3) years of experience in writing guidance or best practice documents;
- At least two (2) years of experience collecting and analysing stakeholder input via large consultations, interviews and/or focus groups
- Experience in implementing DEI strategies and deep knowledge of gender, diversity, and inclusion language
- Demonstrated experience in compliance and conformity assessment for certification

As part of the proposal, the Bidder must include the following information for each Team Member (resource):

- a) Name of the proposed Team Member and the role for which they are proposed;
- b) A list of qualifications directly related to the requirements;
- c) Chronological work experience;
- d) A detailed list of relevant academic and professional attainments.

Only those proposals that are judged by the Evaluation Committee to have met all stipulated mandatory criteria will receive further consideration.

PART B: Point-Rated Requirements

Each proposal must demonstrate to the satisfaction of the Evaluation Committee that all stipulated mandatory requirements can be substantiated through the evaluation of the point-rated requirements in the following five (5) categories, for which the respondent must include a response:

Category		Max. Points
I.	Experience/competence in developing standards solutions	26
II.	Project team experience in type of work being proposed	44
III.	Project schedule	20
IV.	Quality of the proposal	10
Total Possible Points		100

The point-rated requirements correspond to specific criteria, which have been identified as forming the basis for the accumulation of points in each of the five (5) categories. Each proposal **must include a response to each category**.

70 of the possible 100 points must be achieved (70%) for the financial elements of the bid to be evaluated.

The Evaluation Committee will assess the experience and competence of the Bidding Organization’s, (“the Bidder”) with respect to **RFP# 2022-08**, in the development of standards solutions.

I. Project Team experience in developing standards solutions

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

“Recent”, unless otherwise stated means within the last five years.

Criterion	Basis for Scoring	Possible Points
a) The Bidder is asked to provide two (2) recent examples that demonstrate that the Project Team has successfully managed volunteer expert committees responsible for the development of standards solution projects and/or like projects (e.g. regulatory and/or guidance documents).	For each example, points will be awarded as follows: <ul style="list-style-type: none"> - up to four (4) points if the demonstrates 1-3 years of experience in managing committees and achieving consensus; - up to eight (8) points if the example clearly demonstrates more than 3 years in managing committees, facilitating discussions, and driving consensus for decision making. Note: If the Bidder provides more than two (2) examples, only the first two (2) examples will be scored in the order they appear. Note: Preference will be given to projects related to DEI implementation strategies, policies and/or other regulatory documents.	16
b) The Bidder is asked to provide two (2) examples that demonstrate the Project Team has experience with the successful oversight of logistics for the development of standards solution projects and/or like projects (e.g. regulatory and/or guidance documents).	For each example, points will be awarded as follows: <ul style="list-style-type: none"> - up to three (3) points if the example show extensive experience in 2 of the logistical requirements listed below (extensive experience requires at least 2 years of experience); - up to five (5) points if the example show extensive experience in all of the logistical requirements listed below (extensive experience requires at least 2 years of experience). Note: Logistics include financial administration of the project, meeting organizing, demonstrated experience with engaging key audience and stakeholder, and facilitating consultations.	10

II. Project team/resource experience in type of work being proposed

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

“Recent”, unless otherwise stated means within the last five years.

Criterion	Basis for Scoring	Possible Points
a) The Bidder is asked to provide two (2) current or recent examples that demonstrate experience and competence in the development of deliverables for the implementation of Diversity, Equity and Inclusion including policies, procedures and change management, etc.	For each example, points will be awarded as follows: - up to four (4) points for DEI projects that are not directly linked to change management, and/or equity implementation programs; - up to eight (8) points for projects directly related to the development of guidance documents for the implementation of DEI in organizations, promoting gender parity, diversity and inclusion.	16
b) The Bidder is asked to provide two recent (2) examples that demonstrates they have active relationships and can engage and drive consultations with organizations, individuals, and groups that have expertise in implementing policies, procedures and change management with a focus on the following five (5) population groups: a. Women and/or non-binary people; b. Racialized, Black, and/or People of Colour; c. People with disabilities (including invisible and episodic disabilities); d. 2SLGBTQ+ and/or gender and sexually diverse individuals ; and e. Aboriginal and/or Indigenous Peoples.	For each example, points will be awarded as follows: - up to four (4) points if the example demonstrates access to expertise for at least three (3) of the five (5) population groups listed; - up to seven (7) points if the example demonstrates access to expertise for all of the five (5) population groups listed. Note: Bidders shall ensure they demonstrate that the combination of their own expertise and that of external organizations ensures access to expertise.	14
c) The Bidder is asked to provide two recent (2) examples that demonstrates they have experience in developing conformity assessment programs	For each example, points will be awarded as follows: - up to four (4) points if the example demonstrates at least 2-5 years of experience in the development and implementation of conformity assessment programs . up to seven (7) points if the example demonstrates a more than 5 years of experience in the development and implementation of conformity assessment programs for both self-assessment and third-party certification.	14

III. Project plan and schedule

The Bidder is required to provide a proposed (preliminary) schedule for the development of each of the deliverables. The Evaluation Committee will assess whether the Bidder has a realistic and well-ordered plan for the coordination of development work.

- The PAS should be developed within 9 months from start to finish of the project starting date (after the first meeting between the developer and SCC).

- The TS is expected within 12-months from start to finish of the project starting date (after the first meeting between the developer and SCC).

Since the two deliverables are to be developed in parallel and the project has an accelerated timeline, further points will be given if the proponent has a reasonable plan to complete the development of the deliverables in a shorter timeframe. The basis for scoring the proposed schedule is provided in the table below.

Criterion	Basis for Scoring	Possible Points
<p>a) The Bidder is asked to demonstrate their ability to successfully develop a Technical Specification (TS) based on the SCC National TS guidance.</p> <p>The bidder should present a plan and schedule that demonstrates that the Bidder has a clear and feasible plan for developing the TS within a 12-month timeframe, mapping out the critical path including provisional dates.</p> <p>Note: If a chart or image is included in the response, the resolution must be high enough such that all labels are clearly readable.</p> <p>Note: A narrative should accompany the schedule, with explanation of how the timelines were determined, including key underlying assumptions.</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to five (5) points for a basic plan that identifies key details, deliverables, and key assumptions; - up to eight (8) points for an adequate plan that identifies the main details, deliverables, and key assumptions; - up to ten (10) points for a thorough plan, that includes details, deliverables, and key assumptions, and explains how they would contribute to the development of a strong Technical Specification, including mitigation plans for any unforeseeable challenges that might lead to a delay in the completion of the TS. 	10
<p>b) The Bidder is asked to demonstrate their ability to successfully develop a Publicly Available Specification (PAS) based on the SCC National PAS guidance.</p> <p>The bidder should present a plan and schedule that demonstrates that the Bidder has a clear and feasible plan for developing the PAS within a 9-month timeframe, mapping out the critical path including provisional dates.</p> <p>Note: If a chart or image is included in the response, the</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - up to five (5) points for a basic plan that identifies key details, deliverables, and key assumptions; - up to eight (8) points for an adequate plan that identifies the main details, deliverables, and key assumptions; - up to ten (10) points for a thorough plan, that includes details, deliverables, and key assumptions, and explains how they would contribute to the development of a strong Publicly Available Specification, including mitigation plans for any unforeseeable challenges that might lead to a delay in the completion of the PAS. 	10

Criterion	Basis for Scoring	Possible Points
<p>resolution must be high enough such that all labels are clearly readable.</p> <p>Note: A narrative should accompany the schedule, with explanation of how the timelines were determined, including key underlying assumptions.</p>		

IV. Quality of the proposal

The Evaluation Committee will assess the quality of the proposal to determine whether the information organized within the proposal is presented in a clear and comprehensive fashion.

Criterion	Basis for Scoring	Possible Points
<p>a) The Bidder is asked to assure that material within the proposal is formatted, organized, and written in such a way as to make clear to the reviewer where responses to mandatory and point-rated requirements are located. The writing should also be concise, easy-to-read, and edited for typos.</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> - no more than four (4) points if the proposal is poorly organized, difficult to read, and contains frequent typos; - up to seven (7) points if the proposal is generally well-organized but is somewhat difficult to read and contains some typos; - up to ten (10) points if the proposal is highly organized, concise, clearly written, and contains very few to no typos. 	10

APPENDIX D -FINANCIAL TEMPLATE

PROJECT PHASE	STAGE	COST (\$)
Project Initiation	Stage 1: Preliminary	
Technical Specification Development	Stage 2: Initiation	
	Stage 3: Notice	
	Stage 4: Committee	
	Stage 5: Drafting	
	Stage 6: Approval	
Technical Specification Delivery	Stage 7: Publication	
	Stage 8: Maintenance	
Total:		

PROJECT PHASE	STAGE	COST (\$)
Project Initiation	Stage 1: Preliminary	
	Stage 2: Initiation	
PAS Development	Stage 3: Coordination	
	Stage 4: Notice	
	Stage 5: Committee	
	Stage 6: Drafting	
	Stage 7: Public Inquiry	
PAS Delivery	Stage 8: Approval & Publication	
Total:		

Notes

1. All prices quoted are in Canadian funds (excluding HST)