



# Request for Information

FOR

## Translation Services

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## REQUEST FOR INFORMATION

### TABLE OF CONTENTS

- SECTION I – Introduction and Process for Responding to Request for Information
  - SECTION II – Scope of Potential Procurement and General Information
  - SECTION III – Questions to Industry
- 

## SECTION I

### INTRODUCTION AND PROCESS FOR RESPONDING TO REQUEST FOR INFORMATION

#### 1. Requirement

This document is a Request for Information (RFI) to seek input on the proposed procurement of Translation Services. OSFI has a requirement for professional services to support a total work volume that is estimated at approximately 3,500,000 words per year.

The objective of the RFI is to provide industry with the opportunity to present their capabilities and to seek feedback on OSFI's procurement strategy. Responses received during this RFI process may be used by OSFI to determine what should be included in a potential procurement that will meet internal stakeholder requirements and be consistent with industry practices.

#### 2. Background

The Office of the Superintendent of Financial Institutions (OSFI) is the primary regulator of federally chartered financial institutions and federally administered pension plans. OSFI's mission is to protect the rights and interests of depositors, policyholders, pension plan members and creditors of financial institutions, and to advance and administer a regulatory framework that contributes to public confidence in a competitive financial system. OSFI supervises and regulates all banks, and all federally incorporated or registered trust and loan companies, insurance companies, cooperative credit associations, fraternal benefit societies and pension plans.

Detailed information about the Office of the Superintendent of Financial Institutions (OSFI), including our mission and objectives, history, organization and how we regulate can be found at OSFI's website [www.osfi-bsif.gc.ca](http://www.osfi-bsif.gc.ca).

#### 3. Nature of Request for Information

This is not a bid solicitation. This Request for Information (RFI) will not result in the award of any contract; therefore potential suppliers of any goods or services described in this document should not earmark stock or facilities, nor allocate resources, as a result of any information contained herein. Nor will this RFI result in the creation of any source list; therefore, a potential supplier's lack of response to this request will not preclude that supplier from participating in any future procurement activity related to this initiative. The procurement of goods or services described in this document will not necessarily follow this RFI. This RFI is simply intended to solicit feedback from potential vendors with respect to the matters described in this document and its attachments.



This RFI will help inform which procurement approaches should be considered by OSFI. Future procurement activities could include the issuance of a Request for Proposal (RFP).

#### 4. Submission of Responses

1. **Time and Place for Submission of Responses.** Interested respondents should submit responses electronically (via email) to the OSFI Contracting Authority identified in section 7 below. Responses must be received by the time and date indicated on page 1 of this document.
2. **Responsibility for Timely Delivery.** Each respondent is solely responsible for ensuring the response is delivered on time to the correct location. Responses may be submitted electronically as indicated.
3. **Identification of Response.** Each respondent should ensure that its name and return address, the reference number and the closing date are clearly identified in the response.
4. **Return of Response.** Responses to this Request for Information will not be returned.
5. **Content of Responses.**
  - a. Respondents should respond to the questions contained in Section III using the same numbering format.
  - b. Respondents are reminded that this is an RFI and not an RFP and, in that regard, respondents are requested to provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this document could be satisfied. Any marketing or promotional information submitted as part of the responses will not be reviewed.
  - c. Responses will not be used for competitive or comparative evaluation purposes however, for ease of use and in order that the greatest value be gained from responses, OSFI requests that respondents follow the structure outlined below.

#### 5. Response Costs

OSFI will not reimburse any respondents for expenses incurred in responding to this RFI.

#### 6. Treatment of Responses

- a) **Use of Responses.** Responses will not be formally evaluated. However, the responses received may be used to assist OSFI in the development of the related procurement strategies and RFP requirements. OSFI will review all responses received by the deadline for responses. OSFI may, at its sole discretion, review responses received after the deadline.
- b) **Review Team.** A review team composed of representatives of OSFI will review the responses. OSFI reserves the right to hire any independent consultant or use any Government resources that it deems necessary to review any response. Not all members of the review team will necessarily review all responses.
- c) **Confidentiality.** Respondents should mark any portions of their response that they consider proprietary or confidential. OSFI will treat those portions of the response as confidential to the extent permitted by the *Access to Information Act* (ATIP).
- d) **Follow-up Activity.** OSFI may, at its discretion, contact any representative to follow-up with additional questions or for clarification of any aspect of a response. OSFI may, at its discretion,



request a closed meeting with any one or every respondent to further discuss their RFI response and recommendations.

## **7. Enquiries**

Because this is not a bid solicitation, OSFI will not necessarily respond to enquiries in writing by circulating answers to all potential respondents. During the RFI process, OSFI will address only questions pertaining to the RFI process. Requests for additional information regarding the executive coaching services (beyond that contained in this document) will not be accommodated. Respondents with questions regarding this RFI may direct their enquiries to the OSFI Contracting Authority as follows:

Jade Bédard  
Senior Contracting Officer  
Office of the Superintendent of Financial Institutions  
E-mail : [contracting@osfi-bsif.gc.ca](mailto:contracting@osfi-bsif.gc.ca)



## SECTION II

### SCOPE OF POTENTIAL PROCUREMENT AND GENERAL INFORMATION

#### 1. OVERVIEW

The Office of the Superintendent of Financial Institutions (OSFI) is the primary regulator of federally chartered financial institutions and federally administered pension plans. It was established by an Act of Parliament in 1987.

OSFI supervises and regulates all banks, and all federally incorporated or registered trust and loan companies, insurance companies, cooperative credit associations, fraternal benefit societies and pension plans. Specifically, the Office administers the Bank Act, the Trust and Loan Companies Act, the Cooperative Credit Associations Act, and the Pension Benefits Standards Act.

OSFI also provides actuarial advice to the Government of Canada and conducts reviews of certain provincially chartered financial institutions by virtue of federal-provincial arrangements or through agency agreements with the Canada Deposit Insurance Corporation (CDIC).

For additional information, visit our Web site at: [www.osfi-bsif.gc.ca](http://www.osfi-bsif.gc.ca).

#### 2. GENERAL REQUIREMENT

OSFI has a requirement to establish a contract for Translation Services to support a total work volume that is estimated at approximately 3,500,000 words per year. OSFI does not guarantee any specific volume of work to any successful Contractor.

As a government agency, all written communications from OSFI with the financial institutions and their associations, other federal government departments and agencies, Parliament and the public at large must be presented in both official languages in order to comply with the Official Languages Act.

The information to be translated, and style of translation, will depend on the subject matter and the target audience. Some may be administrative or legal in nature, while some may be destined to a specialized public and may be extremely technical.

The Contractor must provide French to English and English to French translation services for up to 365 calendar days per year, on an “as and when requested basis”, at a production rate of 4,500 words per day for English to French translation and at a rate of 3,000 words per day for French to English translation, including receipt of the text to be translated, quality control and delivery of the work completed.

The Contractor must engage with other OSFI translators as required to ensure consistency and standardization in the use of terminology. The Contractor must follow the rules set out in *Canadian Style* and *Le guide du rédacteur* as well as the OSFI usage and conventions for texts of a particular nature.

#### 3. SPECIFIC REQUIREMENTS

##### 3.1 Translation Requests

- 3.1.1 Every request for translation will be assigned a case number by OSFI. All interactions with OSFI regarding the case shall include a reference to the case number (e.g. requests for additional information, delivery of translated documents, invoices, etc.).



- 3.1.2 All requests for translation will be authorized by the Project Authority. A request for translation from the Project Authority will provide the following information:
- the Translation Service Request Number;
  - the details of the work activities to be performed;
  - the title of the document;
  - the name of the directorate or organization issuing the document;
  - the number of words to be translated;
  - the urgency of the work;
  - the delivery deadline;
  - the name of the OSFI technical contact for the work.
- 3.1.3 The Contractor must not perform any work not duly authorized by the Project Authority. All work performed without the approval of the Project Authority will be at the Contractor's own expense, and OSFI will not be responsible for the payment of such expenses.
- 3.1.4 In cases where a "cent per word" basis is not applicable to a required translation, the Contractor should submit a request to the OSFI Project Authority to authorize an hourly rate. An example of such a situation would be the translation of a table of separate words, each of which requires some research time to translate.

## 3.2 Style of Translation and Linguistic Quality

- 3.2.1 Most requests for translation will fall within the following subject areas:
- Human Resources (e.g. job descriptions or posters);
  - Corporate Memos and Communications (e.g. communicating organizational updates/information);
  - Interest articles for publication on OSFI's Intranet;
  - Banking;
  - Financial regulation;
  - Financial supervision;
  - Insurance;
  - Pension Plans;
  - Basel Capital Accord;
  - Actuarial reports and studies;
  - International Financial Reporting Standards (IFRS).
- 3.2.2 The style used in the translation will be legal or administrative in nature. The style required depends on the subject matter and the target audience. The Contractor must work with the OSFI Translation Coordinator (to be determined at Contract Award) to ensure consistency and standardization in the use of terminology. The Contractor must follow the rules set out in *The Canadian Style*, *Le guide du rédacteur* as well as the OSFI usage and conventions for texts of a particular nature.
- 3.2.3 The Contractor must use the terminology records provided by OSFI (to be provided at contract award) as well as the terminology in any reference documents transmitted to ensure consistency and standardization.



### 3.3 Software used by OSFI

- 3.3.1 All translations, modifications and revisions must be done in the same layout, format, and file type as the source document. At the time of issuing the requirement for translation services, OSFI is using MS Office 365 (Word 365, Excel 365, PowerPoint 365, One Note 365 and Visio 365) and Adobe Acrobat PDF or Foxit Phantom PDF.
- 3.3.2 The Contractor must accept documents in the above-noted electronic file types for translation and must return translated documents in these file types unless otherwise directed by the Project Authority or OSFI translation coordinator.
- 3.3.3 The Contractor must have access to translation software that supports translation memory and terminology management (for example: Logiterm etc.)
- 3.3.4 The Contractor is responsible for having the necessary software available to perform the work. OSFI will not supply software to the Contractor for use in translation.

### 3.4 Quality Assurance

- 3.4.1 The Contractor must perform quality assurance checks for all documents translated before delivery. Quality assurance and text revision are required for all work prior to delivery to OSFI and must be performed by a translator who did not translate the original text. The key steps to be followed, as a minimum, are:
  - a. Compare the target document with the source document;
  - b. Verify the terminology against the reference documents provided by OSFI;
  - c. Ensure that the layout and formatting are consistent with the source document; using the wordmark and/or logos appropriate for the language of the target document.
  - d. Ensure that the file type of the target document is the same as that of the source document.
- 3.4.2 Translations must not contain any major mistakes (such as mistranslations, gibberish, mistake in figures, anglicisms, gallicisms, omissions resulting in inaccuracy or lack of comprehension of the text, grammar and syntax errors) and no more than six (6) minor mistakes (e.g. typographical errors, punctuation errors, layout errors, omission of hyphens) per 1500 words of text. The work will be evaluated by OSFI based on format and style.
- 3.4.3 The work requested will be subject to evaluation by OSFI to ensure compliance with the requirements herein, as well as with the regulations and policies in place, generally known and accepted by the translation community.
- 3.4.4 Unsatisfactory translations containing one (1) or more major mistakes and/or more than six (6) minor mistakes per 1500 words of text might be



subject to one or more of the following penalties at the sole discretion of OSFI:

- a. The work will be returned by OSFI to be redone by the Contractor at no additional cost to OSFI. The work to be redone will be performed within the timeframe given by OSFI, regardless of if it requires completing the work during evening, weekend and/or statutory holidays to meet the deadline;
- b. The work will be redone by another Contractor or by OSFI. In this case, the Contractor will be informed that the translation that was done is unacceptable and that they will not be authorized to submit an invoice for the work that was initially completed; or
- c. The contract will be terminated by OSFI if OSFI determines that the number of mistakes is excessive when compared to OSFI expectations.

### **3.5 Word Count**

- 3.5.1 A word is defined as a continuous and finished series of letters. Numbers and figures appearing in the text are counted as words. Word counting features of word processing software will be used to determine the number of words in a document.
- 3.5.2 The word count of all documents to be translated will be stated by OSFI and only this word count will be used for payment.
- 3.5.3 If the Contractor disagrees with the number of words, OSFI will do a recount in an attempt to reach an agreement with the Contractor. The Contractor must indicate to OSFI any disagreements with the word count. The final decision on word count will be made by OSFI at its sole discretion.

### **3.6 Reception, Transmission, and Management of Documents**

- 3.6.1 The Contractor must have the required equipment to receive or transmit documents via e-mail or a secure system/portal.
- 3.6.2 The Contractor must manage requests for translation, the associated documents to be translated, and the resulting translations, to provide OSFI with accurate, timely results. Such management must account for, as a minimum, and not limited to:
  - a. multi-part documents in situations where the parts are delivered to the Contractor separately;
  - b. a work priority system that includes the ability to accommodate changes in priority dictated by OSFI, in which current work is suspended and other work is substituted for earlier translation;
  - c. version control, and correct management of the translations, where the same document is sent to the Contractor a number of times, with adjustments in each delivery of the document, even though the initial version of the document is not completely translated.





3.6.3 The Contractor must have the capacity and security clearance to handle classified documents including Protected B.

### 3.7 Work Location and Services

3.7.1 The work shall be performed on the Contractor's premises. All technical and support services (clerical/administrative, etc.), supplies and equipment necessary to accomplish tasks must be provided by the Contractor at its own costs.

3.7.2

3.7.3 The work must be delivered to the translation-traduction@osfi-bsif.gc.ca email used by OSFI for the purposes of translation-related activities or via the Contractor's secure system/portal.

### 3.8 Response Times

3.8.1 The Contractor must have procedures in place for responding to routine as well as urgent translation requests. For the purpose of this Contract, the type of requests are defined as follows:

- a. Routine requests: A translation with a delivery period allowing completion of the work during normal working hours, based on the production rate of 1,500 words per day per resource.
- b. Urgent requests: A high-priority translation with a delivery period allowing completion of the work during normal working hours based on the production exceeding the capacity of 1,500 words per resource per day or a translation with a delivery period requiring completion of the work outside the normal working hours, on weekends and during federal statutory holidays or requiring a turnaround of less than 24 hours from acceptance of the document by the Contractor.

3.8.2 Availability Confirmation: The Contractor must provide the name and coordinates (e-mail and telephone number) of the primary contact person as well as the back-up person(s) who can accept both routine and urgent requests (during and outside of normal working hours) on behalf of the Contractor.

- a. For any request received by the Contractor during normal working hours (8:00 a.m. – 6:00 p.m EST/EDT, Monday to Friday, excluding weekends and federal statutory holidays), the Contractor must confirm in writing within one (1) hour for urgent requests or two (2) hours for routine requests that it has the capacity to undertake the work requested.
- b. For urgent requests received by the Contractor outside of normal working hours (6:00 p.m. to 8:00 a.m EST/EDT, Monday to Friday, on weekends and on statutory holidays), the Contractor must confirm in writing within 2 hours that it has the capacity to undertake the work requested.
- c. The reply sent to OSFI must indicate whether or not the requested due date can be met. If the requested due date cannot be met, the



Contractor must provide an alternate delivery date that they can commit to.

- d. If the Contractor does not confirm acceptance within the response time, the OSFI Translator Coordinator shall consider the absence of response as a refusal of the work.

3.8.3 The Contractor and their translation resources must be fully contactable during normal working hours. The Contractor must provide an emergency contact number/e-mail address in the case that OSFI cannot reach the Contractor's resources.

3.8.4 The OSFI Translator Coordinator will determine whether requests for translation or for text revisions are urgent.

### 3.9 Assessment of Resources

3.9.1 The Contractor must demonstrate, to the satisfaction of the Project Authority that any translation resource provided meets the requirements under the contract as follows:

- a. **"Replacement Resources"** - any resource proposed to replace an individual that was proposed and evaluated at the time of solicitation will be fully evaluated using the same mandatory and point-rated evaluation criteria from the RFP. Proposed replacements must achieve a total score that is equal or superior to the resource being replaced.
- b. **"Additional Resources"** refers to any resource supplied under the contract that is not deemed by OSFI to be a Replacement Resource. Additional Resources must meet the mandatory requirements evaluation criteria from the RFP.

3.9.2 Under no circumstances must the Contractor allow performance of the services by any resources that have not been duly authorized by the Project Authority.



**SECTION III**  
**QUESTIONS TO INDUSTRY**

#	Questions
<b>Q1</b>	OSFI requires the services of a Contractor who is capable of providing an estimated 3 million words of English-to-French and French-to-English translation services per year. Does your company have the capacity to undertake this requirement? If not, what percentage of this estimated workload can your company handle?
<b>Q2</b>	Do you have a quality assurance mechanism in place? If yes, please describe the mechanisms in which your company performs quality control (i.e. accuracy, terminology, layout, formatting, file type, language etc.). If available, please provide an example of a process flow map detailing each step (i.e. from receipt of request to return of final document) of the quality assurance process.
<b>Q3</b>	Does your company use automatic translation? If yes, please describe how you use automatic translation and whether your quality assurance mechanism differs in these cases. Additionally, how does your pricing model differ when using automatic translation?
<b>Q4</b>	Has your company ever undergone an information technology (IT) security inspection with PSPC's Contract Security Program (CSP)? If yes, how long was the process of being approved to produce/process/store protected or classified contractual information?
<b>Q5</b>	Is your company able to turn around requests for protected documents after hours or on weekend/holidays? If yes, what type of coverage do you have outside of normal working hours?
<b>Q6</b>	What is your company's pricing model? Pricing wise, how do you address translation requests where portions of the text have already been translated?
<b>Q7</b>	OSFI's current translation contracts have two resource categories (English to French translators and French to English translators). We are considering adding in other categories, such as revisers, intake officers and/or differentiating between junior and senior translators. Do you have any recommendations on alternate resource categories and/or any concerns with this approach?
<b>Q8</b>	Does your company differentiate between junior, intermediate and senior translators? If yes, how do you differentiate between these levels? How does the quality assurance process differ in reference to the level at which the translation was completed?
<b>Q9</b>	What is your company's hiring criteria for translators?
<b>Q10</b>	Does your company hire sub-contractors? If yes, what is your hiring criteria for sub-contractors?
<b>Q11</b>	What subject matter areas does your company specialize in?
<b>Q12</b>	Does your company have any translators who specialize in financial related translation (i.e. Canadian Financial Services, Banking/Insurance/Pension Plan Regulation, Actuarial reports etc.) ?
<b>Q13</b>	OSFI is considering separating our translation requirements into two streams – general translation (i.e. HR, IM/IT, Legal etc.) and financial translation (i.e. Canadian Financial Services, Banking/Insurance/Pension Plan Regulation, Actuarial reports etc.). Do you have the capacity/ability to provide resources under both streams?
<b>Q14</b>	Are there any areas of the Statement of Work (SOW) that are unclear? If so, could you propose adjustments or changes for clarification?
<b>Q15</b>	Depending on the feedback from potential suppliers, OSFI's requirement may result in the award of multiple contracts. If more than one contract is awarded, it is proposed that the work be distributed on a proportional basis based on the volume of work, with higher ranked Contractors receiving a higher volume of business than lower ranked Contractors. Do you have any comments/recommendations on this strategy?



<b>Q16</b>	In the event that the proposed strategy in question 15 is implemented, if a translation contractor was to have their contract terminated for performance reasons, the work would be re-distributed to one or more of the other translation contractors. Do you have any comments/recommendations on this strategy?
<b>Q17</b>	It is proposed that additional or replacement resources that are added after the initial contract has been awarded must meet all mandatory evaluation criteria and achieve as a minimum the average mark for the point rated criteria of the resources that were proposed in the bid. Do you have any comments/recommendations on this strategy?
<b>Q18</b>	Can you offer any other comments and/or recommendations that OSFI should consider related to this requirement?