



Return Bids to:

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Natural Resources Canada
Bid Receiving Natural Resources Canada
See herein for bid submission instructions

Request for Proposal (RFP)

Demande de proposition (DDP)

Proposal To: Natural Resources Canada

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

Proposition à: Ressources Naturelles Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments – Commentaires

Issuing Office – Bureau de distribution

Finance and Procurement Management Branch
Natural Resources Canada
580 Booth Street
Ottawa, ON
K1A 0E4

Title – Sujet	
A National Review of Provincial/Territorial Net Zero Regulatory Profiles in Canada's Energy Innovation System	
Solicitation No. – No de l'invitation NRCan-5000070166	Date December 6, 2022
Requisition Reference No. - N° de la demande 5000070166	
Solicitation Closes – L'invitation prend fin at – à 02:00 PM (Eastern Standard Time (EST)) on – le January 10, 2023	
Address Enquiries to: - Adresse toutes questions à: raymond.thai@NRCan-RNCan.gc.ca	
Telephone No. – No de telephone	
Destination – of Goods and Services: Destination – des biens et services: -See herein.	
Security – Sécurité There are security requirements associated with this requirement	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No.:- No. de téléphone:	
Email – Courriel :	
Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
_____	_____
Signature	Date



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The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP.

Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

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



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, and the Security Requirements Checklist.

The Appendixes include Appendix "1" – Evaluation Criteria and Appendix "2" – Financial Bid Presentation Sheet.

1.2 Summary

- 1.2.1 By means of the RFP, NRCan is seeking proposals from bidders to undertake a study to examine the energy regulatory and policy landscape in provinces and territories across Canada.
- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website".
- 1.2.3 This bid solicitation allows bidders to use the CPC 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

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



1.4 Accessibility

Considering accessibility criteria and features is obligatory with this requirement. For additional information consult the [Directive of Procurement Management](#)



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003](#) (2022-03-29) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

- **In the complete text content (except Section 1 and 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:**
- **Subsection 2 of Section 8:**
Delete: : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca, or, if applicable, the email address identified in the bid solicitation. : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessaoumissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca, or, if applicable, the email address identified in the bid solicitation.
Insert: The only acceptable email address to use with CPC Connect for responses to bid solicitation issued by NRCan is: <mailto:procurement-appvisionnement@NRCan-RNCan.gc.ca>
Subsection 2b of Section 8:
Delete: “six business days”
Insert: “five business days”
- **Under Subsection 2 of Section 20:** Delete in its entirety

Subsection 5.4 of [2003](#) (2022-03-29), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 120 days

2.2 Submission of Bids

Bidders must submit all proposals electronically. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation. NRCan encourages bidders to submit all bids earlier than the closing time.

Bids must be submitted no later than the date and time indicated on page 1 of the bid solicitation.

Only bids submitted using CPC Connect service will be accepted.



At least five (5) business days before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open CPC Connect conversation to the following address:

<mailto:procurement-apvisionnement@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 CPC Connect conversation, as detailed in the Standard Instructions [2003 \(Subsection of Section 08\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

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

5000070166 - A National Review of Provincial/Territorial Net Zero Regulatory Profiles in Canada’s Energy Innovation System

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 CPC 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 email, mail or facsimile to NRCan will not be accepted.

2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) business days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as “proprietary” will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.4 Applicable Laws

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

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.



2.5 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least five (5) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.6 Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following reasons: as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)

1. Where the main purpose of the Crown Procurement Contract, or the deliverables contracted for, is:
 - o 4.1 To generate knowledge and information for public dissemination.

2.7 Bid Challenge and Recourse Mechanisms

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

2.8 Accessibility

In accordance with the new [Directive of Procurement Management](#) and the *Accessible Canada Act*, federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, bidders are encouraged to highlight all the accessibility features and components of their proposal for this Statement of Work (SOW) and must:

- (i) demonstrate how the bidder's proposed goods and/or services meet the accessibility requirement at delivery; or
- (ii) describe how the bidder would deliver its goods and/or services under any resulting contract in a way that satisfies the mandatory requirement.



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

The Bidder must submit its bid electronically and in accordance with section 08 of 2003 (2022-03-29), standard instructions. The CPC Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

Canada requests that Bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (1 PDF File)

Section II: Financial Bid (1 PDF File) in a separate file and document

Section III: Certifications (1 PDF File) in a separate file and document

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

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

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

Section I: Technical Bid

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

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

Section II: Financial Bid

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

Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

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



Section IV: Additional Information

The Company Security Officer must ensure through the [Contract Security Program](#) that the Bidder and proposed individuals hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

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

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit (70%) and Price (30%)

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria
2. The rating is performed on a scale of 159 points.
3. Bids not meeting (a) or (b) 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.

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 AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

- 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 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.

5.2.3 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.



5.2.4 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: 2019-01 and the Guidelines on the Proactive Disclosure of Contracts.



Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

Professional fees	Amount
_____	_____
_____	_____

5.2.5 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, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

- 1) Before award of a contract, the following conditions must be met:
 - the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 – Resulting Contract Clauses;
 - the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
- 2) Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- 3) For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.



PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

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

7.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

7.2.1 General Conditions

2010B (2022-12-01), General Conditions – Professional Services - Medium Complexity, apply to and form part of the Contract.

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

7.2.2 Supplemental General Conditions

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

7.3 Dispute Resolution

Mediation

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

Arbitration

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

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

Meaning of "Dispute"

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



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

7.4 Security Requirements

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

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CSP, **PWGSC**. Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by the CSP, PWGSC, the Contractor personnel MAY NOT ENTER sites without an escort.
3. The Contractor/Offeror MUST NOT remove any PROTECTED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, **PWGSC**.
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List, attached at Annex "C";
 - b) *Contract Security Manual* (Latest Edition).

7.5 Term of Contract

7.5.1 Period of the Contract

The period of the Contract is from date of Contract to February 28, 2023 inclusive.

7.5.2 Comprehensive Land Claims Agreements (CLCAs)

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



7.6 Authorities

7.6.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Raymond Thai**
Title: Procurement Specialist
Organization: Natural Resources Canada
Address: 580 Booth Street, Ottawa, ON K1A 0E4
Telephone: 343-543-7427
E-mail address: raymond.thai@NRCan-RNCan.gc.ca

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

7.6.2 Project or Technical Authority

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

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.6.3 Contractor's Representative *(to be provided at contract award)*

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

7.7 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: 2019-01](#) of the Treasury Board Secretariat of Canada.



7.8 Payment

7.8.1 Basis of Payment – Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex “B” for a cost of \$ _____ (to be provided at contract award). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

7.8.2 Method of Payment

Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.9 Invoicing Instructions

Invoices shall be submitted using **the following method**:

E-mail:

Invoicing-Facturation@nrcan-rncan.gc.ca

Note: Attach “PDF” file. No other formats will be accepted

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

Invoices and all documents relating to a contract must be submitted on the Contractor’s own form and shall bear the Contract number: _____ (to be provided at contract award)

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

7.10 Certifications and Additional Information

7.10.1 Compliance

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

7.11 Applicable Laws

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



7.12 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions **4007** (2010-08-16) - Canada to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions **2010B** (2022-12-01), Professional Services - Medium Complexity;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List (SRCL);
- (g) the Contractor's bid dated _____, *(to be inserted at contract award)*

7.13 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor)

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

OR

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

7.14 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.



ANNEX “A” – STATEMENT OF WORK

SW1 Title

A National Review of Provincial/Territorial Net Zero Regulatory Profiles in Canada’s Energy Innovation System

SW2 BACKGROUND

Canada has federal targets for energy emissions, which directly impact electricity system utilities, private sector actors in electricity and energy services, and electricity customers. Regulated utilities are anticipated to play a significant role in supporting Canada’s energy transition to net-zero emission by 2050 (NZ2050), however, in many cases their exact role is still being determined for any given pathway to NZ2050. Considering the expected life of a lot of grid infrastructure, the 28 years that remain to 2050 leaves only one or two investment cycles on particular assets to ensure that the infrastructure is there to support the transition. When contemplating how to scale certain grid modernization solutions in time for achieving the NZ2050 target, the regulatory context for energy utilities comes into focus, as it directly influences utility investments in innovation projects and infrastructure generally.

Economic regulation of energy utilities in Canada governs their investments in infrastructure. Their jurisdiction is provincial or territorial. Federal programming can invest in grid infrastructure to a limited degree, but a considerable portion of the anticipated infrastructure investment in Canada to modernize the grid is anticipated to be funded through other investment mechanisms such as electricity rate base, other levels of government or private sector financing. Given the pressure that federal energy emissions targets will put on the system that governs electricity infrastructure investment, and the potential for some of that pressure to be borne by the electricity rate base, there exists an opportunity for federal programming to better serve economic regulators and activities in the regulatory context.

Technology stakeholders in Canada’s electricity sector consistently report challenges related to regulated energy utilities obtaining approval from economic regulators to implement technological solutions that modernize the electricity grid in support of Canada’s net-zero emissions by 2050 (NZ2050) targets. Provincial and territorial energy regulators have begun exploring approaches to regulating investments in innovation and are interested in implementing new manners of evaluating and incentivising innovation projects, while also respecting legislated mandates with customer affordability top of mind. Civil society stakeholders with an interest in energy system transformation have pointed to the role of ‘innovation sandboxes’ to better address regulatory and non-regulatory issues that are hindering innovation and the adoption of solutions at scale. In response, NRCan plans to explore new approaches to federal program design and delivery which would make pathways for scaling successful innovations in support of net-zero emissions by 2050 targets more discoverable. The Innovation and Electricity Regulation Initiative seeks to enable stakeholders in Canada to better leverage the insight and results from federal electricity grid modernization and research, development, and deployment programs in the energy regulatory context.

This initiative will produce a framework for enhancing federal programs to support provincial and territorial processes that can accelerate grid modernization and scale innovative solutions for the energy sector transformation in Canada. Specifically, this framework will be derived from insights on:

- SW2.1 The relevant actors in the downstream energy sector and their respective roles and requirements for enabling innovation to achieve Net Zero commitments;
- SW2.2 Utility and regulatory role models involved in regulatory energy innovation and key exemplary cases;
- SW2.3 The enabling factors for establishing processes and resources in regulatory structures to support downstream energy sector innovation;



- SW2.4 Additional supports required to enable energy innovation to achieve Net Zero commitments; and
- SW2.5 The policy, regulatory, or market structure(s) required to enable actors in energy innovation.

SW3 Research Overview (Objectives)

NRCan is seeking a qualified Contractor to undertake a study to examine the energy regulatory and policy landscape in provinces and territories across Canada. NRCan is looking for a study to provide profiles of provincial and territorial regulatory constructs that enable and support innovation for energy system transformations and grid modernization developments. Overall, it is hoped that this scan will highlight various provincial and territorial pathways to support downstream energy sector transformation to reach Canada's net-zero by 2050 target. Additionally, this scan will describe the amount of resources provincial and territorial regulators are committing to net zero and grid modernization developments.

NRCan has developed a baseline analysis of Provincial and Territorial regulatory and policy landscapes, which this study can validate, and ultimately, provide an organizational framework to thoroughly define the current regulatory and policy landscape in Canada in regards to energy innovation and the changing landscape for energy markets. Furthermore, this study will identify the regulatory landscape and conditions needed for clean technology implementation at the Provincial / Territorial level and possible mechanisms for Federal policies and programs to support this transition.

NRCan is looking for the Contractor to implement a multi-stage approach to complete this study. The study will undertake a series of key informant interviews of key actors in the regulatory environment, followed by a survey of provincial and territorial regulators to validate the baseline grid modernization and net zero profiles already developed by NRCan, propose a framework for a regulatory landscape of each Province and Territory, and provide the results of a self-assessment of regulatory profiles supplemented by secondary information. The findings of this report will act as key information as we develop a framework for NRCan programs support for regulatory innovation related to energy.

SW4 PRIMARY OBJECTIVES

The primary objectives of this statement of work are as follows:

- SW4.1 To revise and validate the NRCan characterization of regulatory regimes and net zero policy profiles in each province and territory
 - SW4.1.1 This includes identifying and classifying any processes, programs, or exemplary rulings to support energy innovation in the regulatory process (e.g., justification criteria, sandboxes); and
 - SW4.1.2 This includes highlighting case studies and examples that support utility resources for innovation and regulatory resources to inform policy. The consultant will add to an existing case study database developed by NRCan.
- SW4.2 To explore other existing frameworks and their applicability in the Canadian context and propose a framework for Canadian provinces and territories which may help to characterize net zero regulatory and policy profiles of energy sector transformation (e.g., RMI ['Process for Purpose' Report](#));
- SW4.3 To identify the amount of internal resources provincial and territorial regulators are committing to studying the change in market dynamics brought about by grid modernization and an energy transition toward net-zero by 2050.
 - SW4.3.1 The Contractor could consider whether provincial and territorial regulatory regimes are process or program focused, as defined by Sparrow (2020).
 - SW 4.3.2 Utilizing the aforementioned activities to highlight which provinces and territories have regulatory environments taking measures to adapt to evolving grid modernization and net zero transformations, and which jurisdictions require additional support.



SW4.4 To identify or recommend possible policy and program mechanisms to support provincial and territorial grid modernization for energy system transformation informed by the above (e.g., SEPA's RENOVATE framework)

SW5 PROJECT REQUIREMENTS

SW5.1 Tasks, Deliverables, Milestones and Schedule

The research will involve primary data collection through multiple methods to validate and define the net zero provincial and territorial regulatory profiles. The main stakeholders for the research will be Canadian energy regulators.

SW5.1.1 Tasks

The research methods will include the following:

SW5.1.1.1 A literature review of frameworks for regulatory readiness in terms of downstream energy sector transformation, and validation of baseline profiles developed by NRCan. The framework will be validated through the following activities:

SW5.1.1.1.1 Key informant interviews of provincial and territorial economic energy regulators and members of CAMPUT to validate and verify baseline profiles and to inform the preliminary framework development. These interviews will ask key informants to review previously developed profiles, to review and validate information on the framework, as well as provide key insights on challenges and opportunities for regulatory innovation to meet net zero goals in Canada; and

SW5.1.1.1.2 Broader survey of provincial and territorial economic regulators and CAMPUT members to validate and verify the baseline profiles, to develop the framework for regulatory readiness and to identify possible measures for support. The survey will firstly ask recipients to review and validate the profiles. Secondly, the survey will also ask pertinent information on the processes for regulatory approvals for net zero technologies, level of resources committed for grid modernization, necessary program supports, gaps and opportunities as well as other pertinent information to inform the framework development.

SW5.2.1 Milestones

The Contractor must perform the following:

SW5.2.1.1 Framework Development: Conduct relevant literature reviews or policy scans and develop a framework to guide the research

SW5.2.1.2 Data Collection Phase 1: Develop and conduct the key informant interviews;

SW5.2.1.3 Data Collection Phase 2: Develop and conduct the surveys;

SW5.2.1.4 Data Analysis: Analyze the outcomes of the key informant interviews, surveys and literature review.

SW5.2.1.5 Summarize the results of the data analysis into key outcome documents, specifically:

SW5.2.1.5.1 Summarize the results of the data analysis into an outcome report

SW5.2.1.5.2 Summarize the results of the data analysis into a presentation;

SW5.2.1.5.3 Summarize the results of the data analysis into relevant research brief for senior management;

SW5.2.2 Deliverables

The contractor must deliver the following:

SW5.2.2.1 A framework for Provincial and Territorial net zero and grid modernization regulatory profiles. This framework will highlight the resources and regimes for downstream energy sector innovation as part of the sector transformation to support net-zero emissions by 2050;

SW5.2.2.2 A validated summary of provincial and territorial profiles of regulatory regimes across Canada using the above framework;

SW5.2.2.3 The development of a research report summarizing:



- SW5.2.2.3.1 The framework for provincial and territorial net zero and grid modernization regulatory profiles
- SW5.2.2.3.2 Grid modernization and net zero regulatory profiles for each provincial and territorial jurisdiction;
- SW5.2.2.3.3 The regulatory resources and supportive policies required for each Province and Territory for energy system innovation and net zero measures;
- SW5.2.2.3.4 Key insights developed through the primary data collection; and
- SW5.2.2.3.5 Summary of possible Federal policy and program supports to enable regulatory readiness.
- SW5.2.2.4 Development of a related research presentation;
- SW5.2.2.5 Development of a related research brief for senior management; and
- SW5.2.2.6 Regular project update meetings with the Project Authority.

SW5.2.3 Project Schedule

Milestones	Tasks	Deliverables (SW 5.2.2)	Time Schedule*
#1	Literature Review & Framework Development (SW 5.2.1.1)	Framework for Grid Modernization and Net Zero regulatory profiles for downstream energy sector transition in Canada's provinces and territories	3 weeks
#2	Data Collection Phase 1 (SW 5.2.1.2)	Key informant interview(s)	3 weeks
#3	Data Collection Phase 2 (SW 5.2.1.3)	Survey(s) of regulatory agencies	1 month
#4	Data analysis (SW 5.2.1.4)	Analysis outcomes Progress reports Updates	1 month
#5	Results & Final Outcome Documents (SW 5.2.1.5)	Framework Summary of Provincial / Territorial profiles Outcome Report Research presentation Briefing note(s) Regular Project Update Meetings	1 month

*Dates are considered to be tentative and will be finalized upon Contract Award.

SW6 REPORTING REQUIREMENTS

- SW6.1 The Contractor **must** provide regular updates to the project team including:
 - SW6.1.1 A kick-off meeting with the project team;
 - SW6.1.2 Regular progress meetings for 30 minutes with the project team. Timing to be determined by the Project Authority and the Contractor during the kick-off meeting;



- SW6.1.3 Research approval meetings with project team prior to interviews, surveys, and finalization of report;
- SW6.1.4 Submission of report updates following the research and data collection processes; and
- SW6.1.5 Results presentations following the analysis.

SW7 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.

SW7.1 Specifications and standards

Work will be delivered as described in the previous sections including:

- SW7.1.1 **Key stakeholder interviews and analysis.** The Contractor **must** develop the questions, materials, agendas, and logistics for the interviews including the software(s) and digital tools required, and the provision of staff to effectively analyse and collect the data. The Project Authority will approve the process and questions prior to interviews.
- SW7.1.2 **Survey with provincial and territorial regulatory actors and analysis.** The Contractor **must** develop the questions, materials, agendas, and logistics for the survey including the software(s) and digital tools required, and the provision of staff to effectively analyse and collect the data. The Project Authority will approve the process and questions prior to the survey.
- SW7.1.3 **Documents to summarize the results of the analysis listed above.** The Contractor **must** provide the following output documents:
 - SW7.1.3.1 1 Synthesis report following the interviews and survey. The report **must** be delivered in a standard report format (i.e., Background, introduction, methodology, results, discussion, conclusions). This report **must** include:
 - SW7.1.3.1.1 Provincial and territorial net zero regulatory profiles. This **must** involve the regulatory resources and supportive policies for each Province and Territory for energy system innovation and net zero measures. This could include an overview of whether each province and territory are program or process centric (Sparrow, 2020);
 - SW7.1.3.1.2 Summary of key insights from the interviews;
 - SW7.1.3.1.3 Summary of key insights from the survey; and
 - SW7.1.3.1.4 Policy and program recommendations.
 - SW7.1.3.2 Briefing note summarizing the key results and policy implications;
 - SW7.1.3.3 Presentation deck of key results, to be submitted in PPT file:
 - SW7.1.3.3.1 The Contractor **must** also provide the result presentation the project team in the form of a formal presentation

SW7.2 Technical, Operational, and Organizational Environment

To fulfil the key requirements for this statement of work, the following elements related to the technical, operational, and organizational environments should be noted.

SW7.2.1 Technical Environment

Due to current restrictions due to COVID-19, the data collection, the meetings with the Project Authority and associated stakeholders will take place virtually. The Contractor **must** provide the relevant logistics expertise and software capabilities to successfully facilitate these meetings and the collection of data.



SW7.2.2 Operational Environment

To facilitate the data collection, the Contractor **must** provide stakeholder survey and interview materials both French and English.

SW7.2.3 Organizational Environment

The Project Authority will have final approval authority on all matters related to the fulfillment of this work. This involves the survey and interview processes, the survey and interview questions, related materials, final reports and outcome documents.

SW8 OTHER TERMS AND CONDITIONS OF THE STATEMENT OF WORK

SW8.1 Contractor's Obligations

In addition to the obligations outlined in the previous sections of this Statement of Work, the Contractor **must**:

- SW8.1.1 Keep all documents and proprietary information confidential;
- SW8.1.2 Return all materials belonging to NRCan upon completion of the Contract;
- SW8.1.3 Submit all written reports in hard copy and electronic Microsoft Office Word and PDF formats;
- SW8.1.4 Attend meeting with stakeholders, if necessary;
- SW8.1.6 Participate in teleconferences, as needed;
- SW8.1.7 Attend meeting at NRCan sites, if required;
- SW8.1.8 Ensure that no documents deemed Protected (or higher) are stored or maintained on the contractor's premises outside of the NRCan digital repository/telework environment.
- SW8.1.9 Have access to the necessary software(s), technology, and digital tools to deliver, develop, and analyze the data required for the project; and
- SW8.1.10 Have access to the skills and staff necessary to deliver develop and analyze the data required for this process.

SW8.2 NRCan's Obligations

To support this SOW, NRCan shall provide:

- SW8.2.1 Access to departmental materials, government and departmental policies and procedures, publications, reports, studies, etc.;
- SW8.2.2 Access to online meeting software, where applicable.
- SW8.2.3 Access to a staff member who will be available to assist with the coordination of activities if required;
- SW8.2.4 A list of proposed regulatory contacts, and facilitate introductions if required;
- SW8.2.5 Provide comments on draft reports within five (5) working days;
- SW8.2.6 Ensure that no document deemed Protected (or higher) be shared with the contractor (hard copy) outside the NRCan network; and
- SW8.2.7 Provide other assistance or support.

SW8.3 Location of work, work site, and delivery point

The work is expected to be completed at the contractor's place of business. The work will be delivered virtually through the delivery of the engagement sessions and delivery of final reports and outcome materials.

All work must be performed within the Citrix Telework environment and then saved in GCDocs or other NRCan approved repository (i.e. none of the documentation/files may be downloaded to contractor's local PC).



When connecting a device to the NRCan network, the contractor must utilize a trusted (non-public) WiFi access point.

SW8.4 Language of work

The work will be conducted predominantly in English; however, the communication with stakeholders, including interview and survey materials will need to be in both French and English, where respondents in interviews or surveys will have the right to correspondence in the official language of their choice.

SW9 Accessibility

In accordance with the Policy on the Planning and Management of Investments - <https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32593>; Directive on the Management of Procurement - <https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32692>) and the Accessible Canada Act, federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, Bidders must highlight all the accessibility features and components of their proposal for the requirement described in the Statement of Work (SOW).

SW10 DIVERSITY

Natural Resources Canada is committed to making our Department more inclusive for everyone and fostering an equitable workplace culture that values diversity and creates an environment that is welcoming and rewarding for all. We encourage the businesses that work with us to reflect these values. More information can be found at: <https://www.canada.ca/en/government/publicservice/wellness-inclusion-diversity-public-service/diversity-inclusion-public-service2.html>



ANNEX "B" – BASIS OF PAYMENT

(To be completed at Contract Award)



ANNEX "C" - SECURITY REQUIREMENTS CHECK LIST (SRCL)



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat 170879
Security Classification / Classification de sécurité UNCLASSIFIED

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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Government of Canada
Gouvernement du Canada

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No Yes
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET- SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No Yes
Non Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No Yes
Non Oui

PRODUCTION

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

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No Yes
Non Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No Yes
Non Oui



Contract Number / Numéro du contrat 170879
Security Classification / Classification de sécurité UNCLASSIFIED

PART C - (continued) / PARTIE C - (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET Très SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC Très SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET Très SECRET
											A	B	C			
Information / Assets Renseignements / Biens																
Production																
IT Media / Support TI																
IT Link / Lien électronique																

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

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

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

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



Last SRCL page to be inserted at Contract Award.



APPENDIX “1” - EVALUATION CRITERIA

Bidders 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 bidders.

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

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

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

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.

Criterion ID	Mandatory Criteria	Compliant	Cross Reference to Proposal (Page #)
<p>M1</p>	<p>The Bidder MUST provide three (3) project summaries of previous work related to energy systems and detailed research during the past three (3)* years. This includes:</p> <ol style="list-style-type: none"> 1. The name of the client organization; 2. A brief summary of the project, including: description of the scope of services provided (max 500 words); 3. The dates and duration of the project; and 4. A description of the methodology and tools implemented. <p>*From date of bid solicitation on page #1 of the RFP.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>M2</p>	<p>The Bidder MUST provide a Project Work Plan including:</p> <ol style="list-style-type: none"> 1. Project overview with key activities and deliverables; 2. Timelines and milestones; 3. Research methodology; and 4. Project team and experience 	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	



Criterion ID	Mandatory Criteria	Compliant	Cross Reference to Proposal (Page #)
M3	<p>The Bidder's proposed Project Team Leader MUST have at least five (5) years of experience* in leading and delivering mixed-methods research projects and in the energy sector. In addition, at least one (1) of those years MUST be within the past three (3)** years. The experience MUST be identified in the CV.</p> <p>*The required experiences MUST be summarized with a summary table identifying relevant projects conducted, including: the name of the client organization, a brief description of the project's scope, the duration of the project, and the project lead's the role.</p> <p>** From date of bid solicitation on page #1 of the RFP.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Criterion ID	Mandatory Criteria	Compliant	Cross Reference to Proposal (Page #)
<p>M4</p>	<p>The Bidder MUST include within their proposal a detailed curriculum vitae (CV) for each proposed resources* named in their proposal and the Team Leader. CVs MUST include the following:</p> <ol style="list-style-type: none"> 1. A detailed description of the proposed resource’s work experience (indicated in years/months) in the provision of mixed-methods and energy regulatory research; 2. Educational and professional designations, and all other academic credentials; 3. The number of months of previous work experience during the past three (3) years in the provision mixed-methods and energy regulatory research services; 4. The proposed resource’s English and French language capabilities (reading, written and oral).** <p>*NRCan will not evaluate more than five (5) resources submitted. If bidders are providing more than 5, NRCan will evaluate based on the order of submitted.</p> <p>** Demonstrated by providing evidence of education/training (certificate or transcript), and/or previous engagement(s) completed (with a reference*** provided)</p> <p>*** Each reference containing the following:</p> <ol style="list-style-type: none"> a) Name of client b) Name and phone number of client’s contact c) Date(s) and duration of engagement(s) 	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>M5</p>	<p>Bidders MUST outline how they will make accommodation for accessibilities in the conducted research, including the interviews and surveys. This includes visual aids, speech to text software, and/or speech to text.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</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:

Proposals will be evaluated based on the following criteria:

Criterion ID	Rated Requirement	Points Breakdown	Maximum Points	Cross Reference to Proposal Page #
R1	<p>Project Summaries</p> <p>Each project summary in response to Mandatory Requirement M1 will be evaluated against the proposed resources recent and previous experience in successfully delivering research.</p> <p>Each Project Summary will be evaluated on the following factors.</p> <ol style="list-style-type: none"> Projects that took place in the last three (3) years focusing on energy regulation at the provincial or territorial level in Canada. Projects that took place in the last three (3) years that applied mixed-methods research Projects that took place in the last three (3) years that delivered policy or program insights. Projects that took place in the last three (3) years that were provided on time, on budget and in accordance with the established research project goals. 	<p>A maximum of twenty-four (24) points will be provided. NRCan will evaluate a maximum of three (3)* project summaries. Each project will receive a maximum of eight (8) points.</p> <ul style="list-style-type: none"> 0 pts = The bidder does not address the criteria 3 pts = bidder provided projects that took place in the last three (3) years focusing on energy regulation at the provincial or territorial level in Canada. 3 pts = bidder provided projects that took place in the last three (3) years that applied mixed-methods research 1 pt = bidder provided for projects that took place in the last three (3) years that delivered policy or program insights. 1 pt = bidder's projects took place in the last three (3) years that were provided on time, on budget and in accordance with the established research project goals. 	24	



		*NRCan will not evaluate more than three (3) project summaries. If bidders submit more than three (3) project summaries, NRCan will evaluate based on the order of submitted.		
R2	<p>Project Work Plan</p> <p>The project work plan requested at M2 will be evaluated on the following factors:</p> <ol style="list-style-type: none"> 1. Alignment of proposed project to meet the project objectives specified by NRCan 2. Bidders work plan addresses the methodologies and research procedure processes 3. Bidders work plan provides an approach addressing the contexts of energy regulation in Canada, grid modernization, and net zero goals 	<p>The Bidder's Project Work Plan will be evaluated against the following factors:</p> <ul style="list-style-type: none"> - 0 pts = The bidder does not address the criteria - 5 pts= bidder provided alignment of proposed project to meet the project objectives specified by NRCan - 5 pts = bidder's work plan addresses the methodologies and research procedure processes - 5 pts = bidder's work plan provides an approach addressing the contexts of energy regulation in Canada, Grid modernization, and net zero goals 	15	
R3	<p>Experience in mixed-methods analysis (M4):</p> <p>Each of the Bidder's proposed resource should each have a minimum of two (2)* years of experience in providing mixed methods research and services. This includes literature reviews, surveys, interviews, among other forms of research.</p>	<p>Two (2) points for each year of experience providing mixed-methods analysis and advisory services, beyond the minimum two (2) years, to a maximum of ten (10) points per resource.</p>	50	



	*Demonstrated within each proposed resource's resume.			
R4	<p>Experience in formulating energy policy and / or regulatory research and writing (M4):</p> <p>The Bidder should demonstrate their proposed resources each have a minimum of two (2) years of experience in providing policy-oriented analysis and writing services in a public sector environment.</p> <p>Points will be provided for experience beyond two (2) years.</p>	<p>One (1) point for each year of experience beyond two (2) years, two (2) points if the experience is in the last five (5) years, in providing energy policy / regulatory analysis and advisory services to a maximum of 10 points per resource.</p>	50	
R5	<p>The Team Leader's experience in coordinating activities of project personnel in mixed-methods research in the context of energy and policy</p> <p>Points will be awarded for experience over the mandatory (M3). The Bidder's proposed Project Team Leader MUST have at least five (5) years of experience in leading and delivering mixed-methods research projects and in the energy sector. In addition, at least one (1) of those years MUST be within the past three (3) years.</p>	<p>A maximum of ten (10) points will be awarded as follows</p> <p>≥6-8 years = 2 points ≥8-10 years = 4 points ≥10-12 years = 6 points ≥12-14 years = 8 points ≥14 years = 10 points</p>	10	
R6	<p>The Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organization:</p> <ol style="list-style-type: none"> a. The bidder has internally published policies or commitments on anti-racism and inclusiveness; b. The bidder has publicly available organizational commitments to a diverse workforce; 	<p>Maximum two (2) points will be awarded for each activity.</p> <p>0 point = the bidder does not address. 2 points = the bidder has fully described the activity and provided supporting documents as evidence. 1 point = the bidder has listed the activity but does not provide descriptions or supporting documents.</p>	10	



- c. The bidder’s employees are mandated to take mandatory training on anti-racism
- d. The bidder’s employees are mandated to take unconscious bias training;
- e. The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce.

The bidder **should** provide details of the following activities:

- For activities described in a. and b. (policy and commitments), the bidder should provide copies of policy or commitment documents including their effective date.
- For activities described in c. and d. (training), the bidder should provide the name of the course and the service provider; if developed internally, a copy of the course outline.
- For activities described in e. (staffing), the bidder should provide copies of job posting, or other staffing/recruitment documents demonstrating compliance with the rated criteria.

		Total Points Available	159	
		Minimum Points Required	78	



APPENDIX “2” - FINANCIAL PROPOSAL FORM

1. Firm Price - Milestone Payments

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

Milestone #	Description of Milestone	Firm Price (Applicable Taxes Excluded)
#1	<p align="center">Framework Development (Deliverable #1)</p> <p>Framework for Grid Modernization and Net Zero regulatory profiles for downstream energy sector transition in Canada’s provinces and territories</p> <p><i>Completed within three (3) weeks after Contract Award.</i></p>	\$ _____
#2	<p align="center">Data Collection Phase 1 (Deliverable #2)</p> <p>Key informant interview(s)</p> <p><i>Completed within three (3) weeks after completion of milestone #1</i></p>	\$ _____
#3	<p align="center">Data Collection Phase 2 (Deliverable #3)</p> <p>Survey(s) of regulatory agencies</p> <p><i>Completed within one (1) month after completion of milestone #2</i></p>	\$ _____
#4	<p align="center">Data analysis (Deliverable #4)</p> <p>Progress reports Updates</p> <p><i>Completed within one (1) month after completion of milestone #3</i></p>	\$ _____
#5	<p align="center">Results & Final Outcome Documents (Deliverable #5)</p> <p>Outcome Report, Briefing note(s), Framework, Provincial / Territorial profiles</p> <p><i>Completed by February 28, 2023</i></p>	
Total Firm Price for Financial Proposal Evaluation:		\$ _____