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Ressources naturelles
Canada

Natural Resources
Canada

UNCLASSIFIED - NON CLASSIFIÉ

RFP #NRCan-5000078390

APPENDIX “2” - FINANCIAL BID PRESENTATION SHEET 34

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.

By signing its bid, the bidder confirms that they have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and certifies that:

1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Federal Contractors Program for Employment Equity - Certification, the Insurance Requirements and any other annexes. .

1.2 Summary

By means of the RFP, Natural Resources Canada (NRCan), through the Office of Energy Efficiency's (OEE) Homes and Communities Division, is seeking external services to conduct research and provide an analysis of some of these tools and accompanying guidance.

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 fifteen (15) working days from receipt of the results of the bid solicitation process. The debriefing will be done in writing, by email.

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](#) (2023-06-08) 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 “PWGSC”
Insert: “Natural Resources Canada.” and “NRCan”
- **At 02 Procurement Business Number:**
Delete: “Suppliers are required to”
Insert: “It is suggested that suppliers”
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 1:**
Delete: in its entirety
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2a:**
Delete: : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessomissions-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: procurement-provisionnement@NRCan-RNCan.gc.ca
- **At 08, Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2b:**
Delete: “six business days”
Insert: “five business days”
- **At 20, Further information, article 2b:**
Delete: in its entirety

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

2.2 Submission of Bids

Bidders must submit all proposals using the Canada Post Canada (CPC) Connect service. 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.

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:

procurement-approvisionnement@NRCan-RNCan.gc.ca

Note 1: 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 \(article 08, paragraph 2\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

Note 2: Send as early as possible in order to ensure a response, Requests to open a CPC Connect conversation received after that time may not be answered.

IMPORTANT: It is requested that you write the bid solicitation number in "Subject" of the email:
[NRCan-5000078390 – Home Resilience Analysis](#)

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 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 FPS, 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.

2.4 Enquiries - Bid Solicitation

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

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

enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

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

2.6 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) calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.9 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.

2.10 Bid Challenge and Recourse Mechanisms

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

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (1 electronic copy)

Section II: Financial Bid (1 electronic copy) in a separate file and document

Section III: Certifications (1 electronic copy)

Section IV: Additional Information (1 electronic copy)

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

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 Bid Presentation Sheet found at Appendix 2.

3.1.2 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

3.1.3 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures

- 3.1.3.1** As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:
- Street Number / Street Name, Unit / Suite / Apartment Number
 - City, Province, Territory / State
 - Postal Code / Zip Code
 - Country

- 3.1.3.2** 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 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; and
 - c. obtain the required minimum points specified for criteria numbers C2 and C3 for the technical evaluation, and;
 - d. obtain the required minimum of 75 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 120 points.
2. Bids not meeting (a) or (b) or (c) or (d) 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 [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 Contractor must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

All applicants, regardless of their status under the policy, must have the following information at the time to participate in a procurement process:

- Suppliers that are corporate entities, including those bidding as joint ventures, must provide a complete list of the names of all current directors or, for a privately owned corporation, the names of the owners of the corporation;
- Suppliers bidding as sole proprietors, including sole proprietors bidding as joint ventures, must provide a complete list of the names of all owners;
- Suppliers that are a partnership do not need to provide a list of names.

Supplier's Legal Name: _____

OR

Name of each member of the joint venture:

Member 1: _____

Member 2: _____

Member 3: _____

Member 4: _____

Organizational Structure:

- corporate entity (shareholders) - provide the names of the current Board of directors
- privately owned corporation - provide a list of the owner's names
- sole proprietor - provide a list of the owner's names

LIST OF NAMES

LAST NAME	FIRST NAME	TITLE

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.2 Education and Experience

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience

5.2.3.3 Former Public servant

<p>Former Public Servants</p> <p>See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".</p>	<p>Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>
	<p>Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"</p>

SIGNATURE for CERTIFICATION

The Contractor certifies having read and understood the information included in the present document and acknowledges receipt.

Name

Date

Signature of Authorized Representative

PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

There are no security requirements associated with this procurement.

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 and the Contractor's technical bid entitled _____, dated _____.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

[2035](#) (2022-12-01), General Conditions - Higher Complexity - Services, apply to and form part of the Contract. [If applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCa)]

7.2.2 Supplemental General Conditions

[4007](#) (2022-12-01), Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the Contract.

7.3 Security Requirements

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

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to June 30, 2025 Inclusive.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Bianca Moore
 Title: Senior Procurement Specialist
 Natural Resources Canada
 Procurement Services Unit
 Address: 580 Booth Street, Ottawa, Ontario K1A 0E4
 Telephone: 343-543-4785
 E-mail address: bianca.moore@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.

7.5.2 Technical Authority

The Project Authority for the Contract is:

Name: _____ (to be filled out at contract award)

Title: _____

Organization: _____

Address: _____

Telephone: ____-____-_____

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.

7.5.3 Contractor's Representative

Name: _____ (to be filled out at contract award)

Title: _____

Organization: _____

Address: _____

Telephone: ____-____-_____

E-mail address: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

7.7 Payment

7.7.1 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 \$ _____ (insert the amount 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.

7.7.3 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.

7.8 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

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

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

7.9 Certifications and Additional Information

7.9.1 Compliance

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

7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____ (*insert the name of the province or territory as specified by the Bidder in its bid, if applicable*).

7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4007](#) (2022-12-01) – Canada to Own Intellectual Property Rights in Foreground Information;

- (c) the general conditions [2035 \(2022-12-01\), General Conditions - Higher Complexity - Services](#), apply to and form part of the Contract.
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the Contractor's bid dated _____, (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award.*"), as clarified on _____ " **or** ", as amended on _____ " *and insert date(s) of clarification(s) or amendment(s)*).

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

SACC Manual clause [A2000C](#) (*insert date*) Foreign Nationals (Canadian Contractor)

Or

SACC Manual clause [A2001C](#) (*insert date*) Foreign Nationals (Foreign Contractor)

7.13 Insurance - No Specific Requirement

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

7.14 Dispute Resolution

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

ANNEX “A” STATEMENT OF WORK

SW.1.0 TITLE

Review and Analysis of Home Resiliency and Hazard Rating Tools

SW.2.0 BACKGROUND

Climate change is increasing the frequency and severity of extreme weather events around the world. Canada’s Changing Climate report (2019) found that Canada is warming twice as fast as the rest of the world and that the effects are being felt through more extreme weather events. Canada’s *National Adaptation Strategy* (NAS) addresses key climate change risks in Canada and includes targets that aim to ensure Canadians are aware of the climate-related risks facing their household and that they are taking measures to respond to the risks.

Across the country, buildings are constantly subjected to the impacts of Canada’s climate, whether it is from extreme weather events (e.g., floods, wildfire) or from more gradual impacts (e.g., increased freeze-thaw cycles). The climate can affect buildings in many ways. Extreme events can pose risks to the integrity of the structure and the safety of its occupants, while gradual changes can deteriorate a building over time. The human costs are becoming increasingly severe; the British Columbia’s Coroners Service confirmed that there were 619 heat-related deaths during the heat dome in 2021, 98% of which happened indoors¹. Economic modelling undertaken by the Canadian Climate Institute suggests that proactive implementation of adaptation measures results in a significant return on investment (e.g., For every \$1 spent on adaptation measures today, \$13-\$15 will be returned in years ahead in direct and indirect benefits)².

The resiliency of the built environment is a priority for several federal departments and agencies who are conducting research and developing and implementing policies and programs to address the issue. To respond to this need in the residential space, in the 2021 mandate letter, the Minister of Natural Resources was directed to create a Climate Adaptation Home Rating Program (CAHRP) as a companion to the EnerGuide home energy audits to help protect homeowners from the impacts of climate change. NRCan has extensive experience working and communicating directly with homeowners through the EnerGuide Home Rating System (ERS). By raising awareness, homeowners would be empowered to undertake retrofits to help increase the resiliency of their homes.

Various entities are developing and publishing guidance and creating rating tools that outline the potential climate risks associated with a home and measures that can be implemented to improve the resiliency of the home. These tools (e.g., online websites and software) are becoming increasingly available, particularly from organizations based in the United States (e.g., HazardAware, Climate Check, First Street Foundation, etc.). In designing its program NRCan would like to assess the tools and accompanying guidance that are currently available, including the benefits and potential limitations of the existing resources. A core component of this work will be to develop a better understanding of the data (e.g., climate data, building information, hazard maps, etc.) that underpins these tools.

SW.3.0 OBJECTIVES

NRCan, through the Office of Energy Efficiency’s (OEE) Homes and Communities Division, is seeking external services to conduct research and provide an analysis of some of these tools and accompanying guidance.

The objective of the work is to provide NRCan with:

- an evaluation of the existing tools and associated guidance that provide information and/or

¹ Government of Canada - [Surviving the Heat – The impacts of the 2021 western heat dome in Canada](#)

² Canadian Climate Institute - [Damage Control](#)

recommendations about location specific risks to homes. This evaluation should highlight possible gaps, issues and/or barriers associated with the tools, as well as the benefits of their particular approaches

- possible benefits and limitations of the tools in a Canadian context and recommendations for what factors should be considered and included in a rating tool for Canadian homeowners/homebuyers.

At a minimum, the analysis of the tools and accompanying recommendations must include the following information (or provide a reason why the information is unavailable):

- the climate hazards/risks considered by the tool(s) (e.g., wildfire, flooding, extreme heat, etc.)
- any asset-specific attributes considered by the tools (e.g. house-specific features that would increase/decrease resiliency)
- the methodology or factors that were used to determine which hazards the tool would address (e.g., most likely to occur, potential for largest financial impact, biggest threat to the safety of homeowners, etc.)
- the data used to inform the tool(s)
- the risk ratings and the rationale (or factors) for the various categories of the (risk rating) scale (e.g., low-high, 1-10, colour coding, etc.)
- the openness, transparency, and robustness of the tool (i.e., is the underlying method for determining hazards/risks clearly described; is the accuracy and precision of risk/hazard outputs commiserate with that of the available input information; are there adequate caveats about data limitations)
- access to the tool/information (e.g., anyone can enter an address into the tool and see any home rating and/or a report, the report and/or rating must be purchased and is only available to the homeowner, etc.)
- the reach of the tools - who is using the tools, where and for what purpose (e.g. homeowners, home buyers, insurance industry, real estate professionals)
- the quality and robustness of the guidance provided (e.g., is it clear that if the tool describes risk, that it includes - or allows the user to include - necessary information on household vulnerabilities and related consequences; does the information enable the user to think further about their risk tolerance and what that means in a changing climate)
- a list of all the adaptation measures the tool(s) recommends (e.g., fire resistant shingles, back-flow preventers, etc.)
- the cost of the rating/report to the homeowner or person who wants to access the information
- the process for obtaining a risk rating (e.g., on-line where the homeowner enters information, an expert undertakes an in-home assessment, through modelling, other)
- whether there are inputs or measures (including structural, performance and behavioural) that a homeowner could add/implement to change their rating.

SW.4.0 PROJECT REQUIREMENTS

SW.4.1 Tasks, Deliverables, Milestones and Schedule

TASKS - The contractor will complete the following tasks:

1. **Project management** – The Contractor will prepare a project plan that outlines the approach for undertaking this project, participate in a kick-off meeting with NRCan and in continued engagement with NRCan on any developments related to the project, including the submission of deliverables on schedule and/or notification of potential delays.
2. **Research, Analysis and Literature Review** – Prepare a draft (annotated) table of contents that provides a high-level overview of the intended focus areas of the analysis (see section 3.0 above for minimum information to be analyzed)
 - Research methodology may include a literature and web-based review, obtaining (generic or publicly available/not location specific) property reports and/or online interviews with tool

developers or other experts, if required. Interviews must be virtual or at the contractor's expense as travel expenses will not be covered.

3. **Prepare a Comprehensive List / Scan Report** - List of tools and accompanying guidance (must include the United States and at least 2 other countries) that have been developed to provide information related to measures that can be implemented to improve the resiliency of a home; and/or improving understanding of the potential climate risk to a home based on its location and characteristics. The scan is not meant to be exhaustive and will focus on those tools and guidance that are most relevant in a Canadian context. Preparation will include the development of a preliminary list for review and comment by NRCan, with NRCan to have final approval, and working with NRCan to incorporate suggestions and edits into the document, if appropriate. All draft(s) and the final version of all materials will be submitted to NRCan.
4. **Prepare Analysis Report** – At a minimum, this report must include an overview / executive summary, background on the tools and guidance available, including who is using them and for what purpose, an analysis of the benefits, gaps, constraints, and/or barriers with the tools and guidance, and provide recommendations for what could work in a Canadian context. Interviews with subject matter experts and developers of tools and associated guidance will need to be organized by the contractor if required to complete this report. Information collected during any interviews will remain non-attributed to a particular source or organization, and should not contain any proprietary or confidential information. Preparation of the report will include the development of an annotated Table of Contents and at minimum one draft version of the report to be submitted to NRCan for review and comment. The contractor will work with NRCan to incorporate suggestions and edits into the document, where appropriate.
5. **Present an overview** that summarizes the findings of the research to a small group of experts at NRCan, which includes submitting a copy of the MS PowerPoint presentation presented.

DELIVERABLES – The Contractor will be accountable for the following deliverables:

- Project plan
- Meetings and communication as required
- One draft, revised version(s) and subsequent final draft of comprehensive list / scan report
- One draft, revised version(s) and subsequent final draft of analysis report
- Brief summary of interviews with experts (if necessary)
- MS PowerPoint presentation

It is anticipated that the scan report will examine a minimum of 7 tools and their accompanying guidance (e.g., HazardAware, Climate Check, First Street Foundation, XDI Cross Dependency Initiative, etc.). The Contractor and NRCan will discuss which tools should be included in the analysis, with NRCan to have final approval.

All reports will be submitted in Microsoft Word. If the structure of the comprehensive list works better in Microsoft Excel, that is acceptable.

MILESTONES AND SCHEDULES

TASKS	DELIVERABLES	TIMING
Task 1 - Project management	<ul style="list-style-type: none"> • Kick-off meeting with Contractor and NRCan representatives • Project plan • Ongoing communications with NRCan 	<ul style="list-style-type: none"> • Kickoff meeting and project plan - 1 week after the contract is signed
Task 2 – Research, Analysis and Literature Review	<ul style="list-style-type: none"> • See tasks 3 & 4 	<ul style="list-style-type: none"> • Ongoing
Task 3 – Prepare a Comprehensive List / Scan Report	<ul style="list-style-type: none"> • Preliminary List • Draft & revisions • Final version 	<ul style="list-style-type: none"> • Preliminary list – 2 weeks after the start of the contract • Draft – 4 weeks after the start of the contract • Final version - 6 weeks after the start of the contract
Task 4 – Prepare Analysis Report	<ul style="list-style-type: none"> • Annotated Table of Contents (TOC) • Draft & revisions • Final version 	<ul style="list-style-type: none"> • Annotated TOC – 3 weeks after the start of the contract • Report Draft – 12 weeks after start of the contract • Final version of report - 14 weeks after the start of the contract
Task 5 – Present an overview of findings	<ul style="list-style-type: none"> • Present and deliver a MS PowerPoint presentation summarizing the work and findings 	<ul style="list-style-type: none"> • 16 weeks after start of the contract

SW.4.2 Reporting Requirements

The Contractor will be required to meet with NRCan on a regular basis (estimate one meeting every two weeks or as necessary) online via MS Teams or an equivalent program. No in-person meetings will be required. The Contractor is expected to inform NRCan regarding any issues with the deliverables and the timeline and should be sending draft products as they are ready for review.

The Contractor will present its findings and recommendations to a small group of experts.

SW.4.3 Method and Source of Acceptance

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

SW.4.4 Specifications and Standards

Deliverables must be provided in editable electronic format.

To be considered complete, the final product must at a minimum meet all of the requirements set out in section 4.1 of this SOW.

To be considered complete, the final product must be evidence based, demonstrated through the use of citations, references, etc.

SW.4.5 Technical, Operational and Organizational Environment

The Contractor is expected to have access to the devices / equipment required for the completion of the contract (e.g. computer, software, etc.). No devices or equipment will be provided by NRCAN. The Contractor is expected to have access to an internet connection sufficient to complete the tasks (email, video conferences, etc.).

Deliverables must be developed and submitted using Microsoft Office applications (e.g. Word, PowerPoint). The final report must be submitted in Microsoft Word.

The Contractor will work directly with members of NRCAN's Office of Energy Efficiency, for whom the final product is intended, for the purposes laid out in Sections 3 and 4 of this SOW.

SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW

SW.5.1 Contractor's Obligations

In addition to the obligations outlined in Section 4 of this Statement of Work, the Contractor shall:

- submit all reports and materials electronically using MS Office products (e.g., Microsoft Word, Excel, PowerPoint)
- attend one meeting every two weeks, or as necessary, with NRCAN representatives (including project kick-off and closure meetings)
- contact and interview the developers and providers of tools and guidance, as needed
- present findings of research to a small group of NRCAN representatives.

SW.5.2 NRCAN's Obligations

NRCAN will facilitate effective and efficient project completion by:

- providing a point of contact at NRCAN to assist with managing meetings and report development
- convening and facilitating comments from expert reviewers to provide input on a timely basis (between 3 to 5 business days)
- offering assistance or other support, as needed.

SW.5.3 Estimated Period of the Contract

The contract shall come into force upon signature by all parties. The estimated end date of the contract is 4 months from the date of Contract Award.

SW.5.4 Location of Work, Work Site and Delivery Point

Work is expected to be completed at the Contractor's place of business.

SW.5.5 Language of Work

Final and draft products will be delivered in English.

SW.5.6 Insurance Requirements

It is the sole responsibility of the Contractor to decide whether or not any insurance coverage is necessary for its own protection or to fulfill its obligations under the Contract, and to ensure compliance with required federal, provincial or municipal law. Any such insurance shall be provided and maintained by the Contractor at its own expense.

Any insurance secured is to the benefit and protection of the Contractor and shall not be deemed to release or diminish its liability in any manner including as may be referenced elsewhere by the provisions of this Contract.



ANNEX "B" BASIS OF PAYMENT

(Will be completed at contract award)



APPENDIX “1” - EVALUATION CRITERIA

<https://gcdocs.gc.ca/nrcan-rncan/lisapi.dll/link/76833548>

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.

Item	Mandatory Criteria	Compliant (Yes/No)	Reference to Bidder’s Proposal
M1	<p>The bidder must have experience* gathering and analysing data and information related to climate change, adaptation to climate change or the built environment.</p> <p>*Experience is defined as having led and completed a minimum of one project in the last 36 months.</p> <p>Bidder to provide the following information:</p> <ol style="list-style-type: none"> 1. Project name 2. Project summary 3. Project Start and Completion Dates 4. Contact Name and Contact Information (references) <p>Note: If the information provided is deemed insufficient for fulfilling project requirements in terms of the above-mentioned criteria, the bid will be considered non-responsive.</p> <p>* References may be contacted to confirm the information provided.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2	<p>The proposal must include the bidder’s and any team member’s résumé to demonstrate the experience requested in M1.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



M3	The proposal must include a detailed work plan for fulfilling the mandate, specifically describing the work to be done to meet the requirements and a full description of how all the deliverables described in this Statement of Work will be met.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M4	<p>The proposal must include a list of previously completed projects related to the work outlined in this Statement of Work (minimum of 1, maximum of 5 projects).</p> <p>In order to demonstrate the required experience, the bidder should provide the following information:</p> <ul style="list-style-type: none"> Project name Project summary Project Start and Completion Dates Contact Name and Contact Information (references) 	<input type="checkbox"/> Yes <input type="checkbox"/> No	

1.2 Evaluation of point 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:

Point Rated Requirements:					
Item	Point Rated Technical Criteria	Max Points	Reference to Bidder's Proposal		
R1	<p>Previous Experience #1</p> <p>Points will be awarded to the bidders with previous project experience related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations. 5 points for each project for a maximum of 15 points.</p> <p>For each submitted project, the bidder should provide the following information:</p> <ul style="list-style-type: none"> • Name of client company; • Duration of the project, including start and end dates; • Brief description of the project, including the project deliverables, and how it relates to the current requirement; and, • Confirmation that the project was successfully completed and/or contact information for references. 	15			
	<table border="1" style="width: 100%;"> <tr> <td style="width: 20%;">Points</td> <td>Condition</td> </tr> </table>	Points	Condition		
Points	Condition				



Point Rated Requirements:														
Item	Point Rated Technical Criteria		Max Points	Reference to Bidder's Proposal										
	15	The bidder has completed 3 or more projects related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations.												
	10	The bidder has completed 2 projects related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations.												
	5	The bidder has completed 1 project related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations.												
	0	The bidder has completed no projects related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations.												
R2	<p>Previous Experience #2</p> <p>Points will be awarded to the bidders with previous project experience consulting with experts for the purpose of gathering data and performing qualitative research to provide recommendations. 5 points for each project for a maximum of 15 points.</p> <p>For each submitted project, the bidder should provide the following information:</p> <ul style="list-style-type: none"> • Duration of the project, including start and end dates; • Brief description of the project, including how the consultations were conducted, and how it relates to the current requirement; and, • Confirmation that the project was successfully completed. <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>15</td> <td>The bidder has completed 3 or more projects leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.</td> </tr> <tr> <td>10</td> <td>The bidder has completed 2 projects leading consultations with experts from for the purpose of gathering data and performing qualitative research to provide recommendations.</td> </tr> <tr> <td>5</td> <td>The bidder has completed 1 project leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.</td> </tr> <tr> <td>0</td> <td>The bidder has no experience leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.</td> </tr> </tbody> </table>		Points	Condition	15	The bidder has completed 3 or more projects leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.	10	The bidder has completed 2 projects leading consultations with experts from for the purpose of gathering data and performing qualitative research to provide recommendations.	5	The bidder has completed 1 project leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.	0	The bidder has no experience leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.	15	
Points	Condition													
15	The bidder has completed 3 or more projects leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.													
10	The bidder has completed 2 projects leading consultations with experts from for the purpose of gathering data and performing qualitative research to provide recommendations.													
5	The bidder has completed 1 project leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.													
0	The bidder has no experience leading consultations with experts for the purpose of gathering data and performing qualitative research to provide recommendations.													
R3	Previous Experience #3		15											



Point Rated Requirements:													
Item	Point Rated Technical Criteria	Max Points	Reference to Bidder's Proposal										
	<p>Points will be awarded to the bidders with previous project experience gathering and analysing climate data and information to provide recommendations. 5 points for each project for a maximum of 15 points.</p> <p>For each submitted project, the bidder should provide the following information:</p> <ul style="list-style-type: none"> Name of client company; Duration of the project, including start and end dates; Brief description of the project, including the project deliverables, and how it relates to the current requirement; and, Confirmation that the project was successfully completed and/or contact information for references. <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>15</td> <td>The bidder has completed 3 or more projects that include gathering and analysing climate data and information to provide recommendations.</td> </tr> <tr> <td>10</td> <td>The bidder has completed 2 projects that include gathering and analysing climate data and information to provide recommendations.</td> </tr> <tr> <td>5</td> <td>The bidder has completed 1 project that includes gathering and analysing climate data and information to provide recommendations.</td> </tr> <tr> <td>0</td> <td>The bidder has no experience gathering and analysing climate data and information to provide recommendations.</td> </tr> </tbody> </table>	Points	Condition	15	The bidder has completed 3 or more projects that include gathering and analysing climate data and information to provide recommendations.	10	The bidder has completed 2 projects that include gathering and analysing climate data and information to provide recommendations.	5	The bidder has completed 1 project that includes gathering and analysing climate data and information to provide recommendations.	0	The bidder has no experience gathering and analysing climate data and information to provide recommendations.		
Points	Condition												
15	The bidder has completed 3 or more projects that include gathering and analysing climate data and information to provide recommendations.												
10	The bidder has completed 2 projects that include gathering and analysing climate data and information to provide recommendations.												
5	The bidder has completed 1 project that includes gathering and analysing climate data and information to provide recommendations.												
0	The bidder has no experience gathering and analysing climate data and information to provide recommendations.												
R4	<p>Work plan</p> <p>Points will be awarded for a detailed work plan that demonstrates:</p> <ul style="list-style-type: none"> sufficient background knowledge of, and familiarity with, the issues surrounding the project content realistic timelines, with key milestones and deliverables identified identification of risks to work plan completion with accompanying risk mitigation strategies. <p>Overall, the work plan should provide enough detail such that an estimate of the Contractor's likely success with the project can be formed.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>15</td> <td>The work plan addresses all aspects and tasks of the work; the schedule respects the deadlines and provides key milestones; the work plan's schedule is realistic; risks and mitigation strategies are identified.</td> </tr> </tbody> </table>	Points	Condition	15	The work plan addresses all aspects and tasks of the work; the schedule respects the deadlines and provides key milestones; the work plan's schedule is realistic; risks and mitigation strategies are identified.	15							
Points	Condition												
15	The work plan addresses all aspects and tasks of the work; the schedule respects the deadlines and provides key milestones; the work plan's schedule is realistic; risks and mitigation strategies are identified.												



Point Rated Requirements:														
Item	Point Rated Technical Criteria		Max Points	Reference to Bidder's Proposal										
	10	The work plan addresses the main key aspects of the work, but the tasks are less detailed; the schedule respects most deadlines and is generally realistic; some risks and mitigation strategies are identified.												
	5	The work plan addresses only some aspects of the work; the schedule respects some deadlines but is generally not realistic; risks and mitigation strategies are not well outlined.												
	0	The work plan does not address key aspects of the work; the schedule does not respect deadlines or is not realistic; risks and mitigation strategies are not identified.												
R5	<p>Project Team Capacity</p> <p>Points will be awarded for proposals that demonstrate that the project team has sufficient resources available to undertake the tasks and deliverables of this project.</p> <p>The proposal also identifies how project team members' previous work experience* relates to the content expectations of this project.</p> <p>*The types of experience are described in criteria R1, R2 and R3.</p> <p>From R1: Experience related to gathering and analysing data and information related to resiliency in the built environment in order to provide recommendations.</p> <p>From R2: Experience consulting with experts for the purpose of gathering data and performing qualitative research to provide recommendations.</p> <p>From R3: Experience gathering and analysing climate data and information to provide recommendations.</p> <table border="1"> <thead> <tr> <th>Points</th> <th>Condition</th> </tr> </thead> <tbody> <tr> <td>5</td> <td>The number of cumulative years of related experience across the project team is greater than or equal to 60 months.</td> </tr> <tr> <td>4</td> <td>The number of cumulative years of related experience across the project team is greater than or equal to 48 months but less than 60 months.</td> </tr> <tr> <td>3</td> <td>The number of cumulative years of related experience across the project team is greater than or equal to 36 months but less than 48 months.</td> </tr> <tr> <td>2</td> <td>The number of years of related experience across the project team is less than 24 months but less than 36 months</td> </tr> </tbody> </table>		Points	Condition	5	The number of cumulative years of related experience across the project team is greater than or equal to 60 months.	4	The number of cumulative years of related experience across the project team is greater than or equal to 48 months but less than 60 months.	3	The number of cumulative years of related experience across the project team is greater than or equal to 36 months but less than 48 months.	2	The number of years of related experience across the project team is less than 24 months but less than 36 months	5	
Points	Condition													
5	The number of cumulative years of related experience across the project team is greater than or equal to 60 months.													
4	The number of cumulative years of related experience across the project team is greater than or equal to 48 months but less than 60 months.													
3	The number of cumulative years of related experience across the project team is greater than or equal to 36 months but less than 48 months.													
2	The number of years of related experience across the project team is less than 24 months but less than 36 months													



Point Rated Requirements:				
Item	Point Rated Technical Criteria		Max Points	Reference to Bidder's Proposal
	1	The number of years of related experience across the project team is less than 24 months.		
R6	<p>Diversity and Inclusion</p> <p>The Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organisation:</p> <p>a. The bidder has internally published policies or commitments on anti-racism and inclusiveness</p> <p>b. The bidder has publicly available organisational commitments to a diverse workforce</p> <p>c. The bidder's employees are mandated to take mandatory training on anti-racism</p> <p>d. The bidder's employees are mandated to take unconscious bias training</p> <p>e. The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce.</p> <p>The bidder should provide details of the following activities.</p> <p>For activities described in a. and b. (Policy and commitments), the bidder should provide copies of policy or commitment documents including their effective date.</p> <p>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.</p> <p>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.</p> <p>1 points for each activity.</p> <p>0 pts = the bidder does not address.</p> <p>0.5 pts = The bidder has provided information on the existence of the activity but does not provide sufficient detail or supporting documents.</p> <p>1 pt =The bidder has fully described the activity and provided supporting documents as evidence.</p>		5	
Total Points Available			70	
Total Points needed to be considered Compliant			29	

APPENDIX "2" - FINANCIAL BID PRESENTATION SHEET



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.

The bidder must complete the schedule below indicating the firm proposed amounts for each step according to the indicated percentages

Milestone #	Description of Milestone	Firm Price (Applicable Taxes Excluded)
1	Task 1 - Project management	\$ _____
2	Task 2 – Research, Analysis and Literature Review	\$ _____
3	Task 3 – Prepare a Comprehensive List / Scan Report	\$ _____
4	Task 4 – Prepare Analysis Report	\$ _____
5	Task 5 – Present an overview of findings	
Total Firm Price for Financial Proposal Evaluation:		\$ _____