



RETURN BIDS TO :

**RETOURNER LES
SOUMISSIONS À :**

Alexander.cormierhowie@sac-isc.gc.ca

**REQUEST FOR STANDING OFFER
DEMANDE D'OFFRE À COMMANDES**

Proposal To: Indigenous Services Canada

We hereby offer to sell to His Majesty the King 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 thereof.

Proposition aux: Services aux Autochtones Canada

Nous offrons par la présente de vendre à Sa Majesté le Roi 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-annexées, au(x) prix indiqué(s).

Comments - Commentaires

**Ce document contient une sécurité
Exigence - This document contains a
Security
Requirement**

**Vendor/Firm Name and address
Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office – Bureau de distribution

Indigenous Services Canada

Title – Sujet National Summit on Indigenous Mental Wellness Event Management	
Solicitation No. – N° de l'invitation 1000252592	Date 21 September 2023
Client Reference No. – N° référence du client N/A	
GETS Reference No. – N° de reference de SEAG	
File No. – N° de dossier N/A	CCC No. / N° CCC - FMS No. / N° VME N/A
Solicitation Closes – L'invitation prend fin at – à 02 :00 PM on – le September 27, 2023	Time Zone Fuseau horaire EDT
F.O.B. - F.A.B. Plant-Usine: Y Destination: Y Other-Autre: Y	
Address Inquiries to : - Adresser toutes questions à: Alexander.cormierhowie@sac-isc.gc.ca	Buyer Id – Id de l'acheteur DY6
Telephone No. – N° de téléphone : 873-354-0959	FAX No. – N° de FAX N/A
Destination – of Goods, Services, and Construction: Destination – des biens, services et construction : NCR	

**Instructions : See Herein
Instructions: Voir aux présentes**

Delivery required - Livraison exigée	Delivered Offered – Livraison proposée
Vendor/firm Name and address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Facsimile No. – N° de télécopieur Telephone No. – N° de téléphone	
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



TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION 3

1.1 SECURITY REQUIREMENTS 3

1.2 STATEMENT OF WORK..... 3

1.3 DEBRIEFINGS 3

PART 2 - BIDDER INSTRUCTIONS 4

2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS 4

2.2 SUBMISSION OF BIDS..... 4

2.3 FORMER PUBLIC SERVANT..... 5

2.4 ENQUIRIES - BID SOLICITATION..... 6

2.5 APPLICABLE LAWS..... 6

2.6 BID CHALLENGE AND RECOURSE MECHANISMS..... 6

PART 3 - BID PREPARATION INSTRUCTIONS 8

3.1 BID PREPARATION INSTRUCTIONS 8

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION 9

4.1 EVALUATION PROCEDURES..... 9

4.2 BASIS OF SELECTION..... 12

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION 13

5.1 CERTIFICATIONS REQUIRED WITH THE BID 13

5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION 13

PART 6 - RESULTING CONTRACT CLAUSES 14

6.1 SECURITY REQUIREMENTS 14

6.2 STATEMENT OF WORK..... 14

6.3 STANDARD CLAUSES AND CONDITIONS 14

6.4 TERM OF CONTRACT 14

6.5 AUTHORITIES 14

6.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS 15

6.7 PAYMENT 15

6.8 INVOICING INSTRUCTIONS 15

6.9 CERTIFICATIONS AND ADDITIONAL INFORMATION..... 15

6.10 APPLICABLE LAWS..... 16

6.11 PRIORITY OF DOCUMENTS 16

6.12 DISPUTE RESOLUTION..... 16

ANNEX "A" 17

STATEMENT OF WORK 17

ANNEX "B" 24

BASIS OF PAYMENT 24

ANNEX "C" 26

SECURITY REQUIREMENTS CHECK LIST 26



PART 1 - GENERAL INFORMATION

1.1 Security Requirements

There is no security requirement associated with this solicitation.

1.2 Statement of Work

As a follow up to the 2022 National Summit on Indigenous Mental Wellness, Indigenous Services Canada is planning a second Summit on October 25 and 26, 2023. The Summit will be a two day hybrid event in Ottawa, Ontario area that will include participation by the Minister of Indigenous Services and the Minister of Mental Health and Addictions. Participants will join in-person or via live webcasting. It is expected that the Summit will welcome up to 350 in-person participants and an estimated 400 to 500 virtual participants.

Given the complexity of a two-day hybrid event, Indigenous Services Canada is requesting the services of an event management company, preferably Indigenous-owned, to support the Department in planning and implementing the 2023 Summit. All anticipated services required of the event management company (the contractor) are outlined in Section 2. Briefly, services required of the contractor include pre-Summit planning and support, on-site support at the Summit venue for the duration of the two day event, support for the virtual component of the Summit and post-Summit work (potentially a post-Summit survey and a What We Heard Report).

The objective of this contract is for an event management company, preferably Indigenous-owned, to support the Department in planning and implementing the 2023 National Summit on Indigenous Mental Wellness to be held on October 25-26, 2023, in Ottawa, Ontario.

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 may be in writing, by telephone or in person.



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.

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

Delete: 60 days

Insert: 90 days

2.2 Submission of Bids

Bids must be submitted electronically only to Indigenous Services Canada (ISC) by the date, time and e-mail address indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by any other means to ISC 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 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.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 3 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 Quebec.

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 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 electronically in accordance with section 8 of the 2003 standard instructions and as amended in Part 2 - Bidder Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Bidders are required to provide their bid in a single transmission. The total size of the email, including all attachments, must not exceed 10 megabytes (MB). It is solely the Bidder's responsibility to ensure that the total size of the email does not exceed this limit.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid

Section II: Financial Bid

Section III: Certifications

Section I: Technical Bid

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

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

3.1.1 Electronic Payment of Invoices – Bid

Bidders will accept Direct Deposit (Domestic and International) for payment of invoices.

The Bidder is not obligated to accept payment by Electronic Payment Instruments.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

3.1.3 SACC Manual Clauses

Section III: Certifications

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



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.
- (c) The evaluation team will determine if there are two (2) or more bids with a valid Canadian content certification with the bids coming from two or more Bidders that are not affiliated within the meaning used in the Competition Act, R.S.C., 1985, c. C-34. In that event, only those bids with a valid certification will be eligible to be awarded a contract; otherwise, all bids will be eligible. If at any point in the evaluation process it is found, whether by determination of invalidity of certifications, determination that bids are non-responsive or withdrawal of bids by Bidders, that there are no longer two (2) or more responsive bids with a valid certification, then all responsive bids will be eligible to be awarded a contract. Canada may conduct the validation of Canadian content certifications at any time in the evaluation process including doing so concurrently with other steps.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

Mandatory Criteria

Bidders must meet all the mandatory requirements of the RFP. No further consideration will be given to Bidders not meeting all the mandatory criteria.

Mandatory Criteria			
No.	Criteria Detail	Met / Not met	Reference to Bidder's Proposal
M1	<p>EXPERIENCE OF THE COMPANY</p> <p>The Bidder must:</p> <ol style="list-style-type: none"> 1. Have been in business a minimum of five (5) years, including a minimum of three (3) years specializing in the provision of event management services; 2. Have a physical place of business within Canada; 3. Offer conference and/or academic /institutional/government event management services. <p>To demonstrate its experience, the Bidder must provide the following:</p> <ol style="list-style-type: none"> a) The number of years the company has been in business; b) The number of years the company has specialized in the provision of event management services; and c) The physical address(es) of the company's place(s) of business within Canada (including street address, city/town and province/territory for each). d) Must provide a general description of their company and the conference / event management services they provide. 		



Mandatory Criteria			
No.	Criteria Detail	Compliant/ Non-Compliant	Reference to Bidder's Proposal
M2	<p>EVENTS/PROJECTS MANAGEMENT</p> <p>The Bidder must provide a detailed description of two (2) large event management projects (large = a minimum of 100 participants) it has led in the past five (7) years. One example should be of an in-person meeting (with or without a virtual component) and the second example should either be a hybrid event (hybrid means has an in-person and a virtual component to the event) or a virtual event.</p> <p>The events/projects described must demonstrate the experience of the Bidder. To demonstrate its experience, the Bidder must provide for each example submitted, the following:</p> <ol style="list-style-type: none"> 1. Name of the project/event; 2. Client (Organization, Department/firm, etc.); 3. Description of event, number of participants in attendance and the activities supported in planning the event that align with or is comparable to what is requested in the Annex "A" Statement of Work; 5. Event length; 6. List of the event management services provided by the Bidder; 7. Indicate if event had concurrent sessions and if yes, how many concurrent sessions. 		

4.1.1.2 Point Rated Technical Criteria

Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

	Point Rated Technical Requirements (RT):	Max. Points	Points Awarded	Cross Reference to proposal
RT1	<p>Project Management Approach – Overall Management Procedures (Maximum: 20 points)</p> <p>The Bidder should propose a general project management approach for the various tasks required to plan and implement the 2023 National</p>			



	<p>Summit on Indigenous Mental Wellness that considers client needs as specified in the Annex “A” Statement of Work.</p> <p>In their project management approach, the Bidder should describe, at a minimum, how they plan to support the following key project activities, contained in Annex “A” Statement of Work: registration support, preparation and dissemination of event materials, travel support for presenters, identification of human resources for note-taking, facilitation, emcee and graphic recording, post-event survey dissemination, development of summary report.</p> <p>*****</p> <p>0 pts – Not acceptable.</p> <ul style="list-style-type: none"> ▪ Bidder does not describe in their proposal how they plan to support any of the 6 key project activities, contained in Annex “A” Statement of Work. Less than established minimum. <p>10 pts – Acceptable</p> <ul style="list-style-type: none"> ▪ Bidder describes in their proposal how they plan to support 1, 2 or 3 of the 6 key project activities, contained in Annex “A” Statement of Work. <p>20 pts – Very good</p> <ul style="list-style-type: none"> ▪ Bidder describes in their proposal how they plan to support 4 or more of the 6 key project activities contained in Annex “A” Statement of Work. 			
<p>RT2</p>	<p>Experience Planning Events for an Indigenous Audience (Maximum: 10 points)</p> <p>The Bidder’s proposal must outline their experience in planning and hosting events that are oriented towards an Indigenous audience.</p> <p>*****</p> <p>0 pts – Not acceptable.</p> <ul style="list-style-type: none"> ▪ Criterion not met – Bidder has not outlined in their proposal if they have experience in planning and hosting events oriented towards an Indigenous audience. Less than established minimum. <p>5 pts – Acceptable.</p> <ul style="list-style-type: none"> ▪ Bidder has provided one example of an event that they planned and hosted that was oriented towards an Indigenous 			



	<p>audience. This is the established minimum.</p> <p>10 pts – Very good</p> <ul style="list-style-type: none"> ▪ Bidder has provided more than one example of an event that they planned and hosted that was oriented towards an Indigenous audience. 			
--	--	--	--	--

Total Points=30 (Passing Mark: 15)

4.2 Basis of Selection

4.1 A0034T - Basis of Selection – Minimum Point Rating

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory technical evaluation criteria; and
 - c. obtain the required minimum of 15 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 30 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. The responsive bid with the lowest evaluated price will be recommended for award of a contract.



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 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 provided 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.



PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

6.1.1 There is no security requirement applicable to the Contract.

6.2 Statement of Work

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

6.3 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>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

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

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from date of Contract to December 29th, 2023, inclusive.

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Alex Cormier Howie
Title: Senior Procurement Officer
Directorate: ISC
Telephone: 873-354-0959
E-mail address: alexander.cormierhowie@sac-isc.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.

6.5.2 Project Authority

The Project Authority for the Contract is:

Name: _____
Title: _____
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.

6.5.3 Contractor's Representative

Name: _____

Title: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

6.6 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.

6.7 Payment

6.7.1 Basis of Payment

6.7.2 Limitation of Expenditure

1.Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and Applicable Taxes are extra.

2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

A. when it is 75% committed, or

B. four months before the contract expiry date, or

C. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.

3If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

6.7.5 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using the following Electronic Payment Instrument:

a) Direct Deposit (Domestic and International);

6.8 Invoicing Instructions

The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

6.9 Certifications and Additional Information

6.9.1 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.

6.10 Applicable Laws

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

6.11 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 general conditions [2010B](#) (2022-12-01)
- (c) Annex A, Statement of Work ;
- (d) Annex C, Security Requirements Check List;
- (e) the Contractor's bid dated _____

6.12 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

1. SCOPE

1.1. Introduction

As a follow up to the 2022 National Summit on Indigenous Mental Wellness, Indigenous Services Canada is planning a second Summit on October 25 and 26, 2023. The Summit will be a two day hybrid event in Ottawa, Ontario that will include participation by the Minister of Indigenous Services and the Minister of Mental Health and Addictions. Participants will join in-person or via live webcasting. It is expected that the Summit will welcome up to 350 in-person participants and an estimated 400 to 500 virtual participants.

Given the complexity of a two-day hybrid event, Indigenous Services Canada is requesting the services of an event management company, preferably Indigenous-owned, to support the Department in planning and implementing the 2023 Summit. All anticipated services required of the event management company (the contractor) are outlined in Section 2. Briefly, services required of the contractor include pre-Summit planning and support, on-site support at the Summit venue for the duration of the two day event, support for the virtual component of the Summit and post-Summit work (potentially a post-Summit survey and a What We Heard Report).

1.2. Objectives of the Requirement

The objective of this contract is for an event management company, preferably Indigenous-owned, to support the Department in planning and implementing the 2023 National Summit on Indigenous Mental Wellness to be held on October 25-26, 2023, in Ottawa, Ontario.

1.3. Background and Specific Scope of the Requirement

Indigenous Services Canada is planning a two day National Summit on Indigenous Mental Wellness on October 25-26, 2023, in Ottawa, Ontario. The 2023 Summit will build on themes and discussions from the 2022 Summit with the agenda being developed in close collaboration with First Nations, Inuit and Métis partners. The Summit will offer a mix of plenary, concurrent and poster sessions.

The scope of the work required by the contractor will include providing administrative and logistical support to the Department in the months leading up to the event as well as on-site logistical support during the Summit for both the in-person and virtual components.

While the agenda is still in development, it is expected that the structure of the Summit will be similar on both days with opening and closing remarks and mix of plenary, concurrent and poster session in between. Breakfast, lunch and health breaks will be provided at the event on both days and an evening reception is being planned on Day 1. Indigenous Services Canada is working closely with Indigenous partners to develop the Summit's agenda, including around identifying and inviting speakers.

Prior to the event, the contractor will support the Summit registration process, provide travel support to presenters (as needed), receive and prepare Summit materials (e.g. copies of presentations, Summit program, agenda and delegate name badges), liaise with other Summit contractors (venue, AV, interpreters) on behalf of the Department as required and identify an emcee and facilitators (require 3) for the Summit. During the event, the contractor will support on-site registration, liaise with contractors as needed (hospitality, AV, interpreters), provide tokens of appreciation for the presenters and will support participants in navigating the venue. After the event, the contractor may be asked to distribute a post-Summit survey to registered participants and produce a What We Heard Report summarizing discussions, key themes and post-Summit survey responses.



The Summit will be a hybrid event and will be live streamed and recorded by an audio-visual company. Indigenous Services Canada will be responsible for contracting the audio visual company to perform this work. The selected audio visual company will develop the web platform that will host the virtual participants and will also be responsible for uploading meeting materials on the platform.

It is expected that the 2023 NSIMW will welcome an estimated 350 in-person participants and an additional 400 to 500 virtual participants. Based on a preliminary agenda, it is expected that the event will host up to 70 presentations. ISC therefore anticipates that the contractor will be required to provide travel support, in the form of issuing a travel stipend to help offset the costs of the speaker's flight and hotel accommodations, up to 70 speakers for a total estimated cost not to exceed \$70,000. This includes speakers from northern and isolated communities within Canada. The value of the stipend issued will be determined by the Project Authority and communicated to the Contractor.

The contractor will also be required to book flights and accommodations for two (2) international travelers from Australia. This would require the contractor to communicate with the two international travelers to identify travel dates and preferences and complete travel bookings on their behalf for flights and hotel accommodations, as required.

2. REQUIREMENTS

2.1. Tasks, Activities, Deliverables and Milestones

2.1.1. Tasks leading up to the Summit (pre-Summit)

- Contractor to participate in virtual meetings, as needed, with the Project Authority to discuss progress on event planning and troubleshoot issues.
- Contractor to communicate with invitees, participants and presenters as needed on behalf of the Project Authority (e.g. "save the date" email, call for presentations (if needed), call for registrations; dietary needs of in-person participants; Summit program), using a distribution list developed and provided by the Project Authority.
- Contractor to provide travel support for Summit speakers, as needed. The Contractor is requested to issue a travel stipend to speakers identified by the Project Authority. The travel stipend will have a pre-set dollar value and is intended to help offset the costs of the speaker's flight and hotel accommodations. Based on a preliminary agenda, the Contractor is to assume that the stipend could be provided for up to 70 speakers for a total estimated cost not to exceed \$70,000.
- Contractor is requested to communicate with the two (2) international travelers for this Summit to identify travel dates and preferences as well as to book flights and hotel accommodations on their behalf.
- Contractor to communicate with all presenters around logistics, around travel stipends to those requesting travel support as identified by the Project Authority, and provide updates on these processes to Project Authority upon request.
- Contractor to liaise with contractors (venue, hospitality, AV, interpreters) as required to ensure event logistics are set and requirements will be met (e.g. menu finalized, room set up confirmed, platform functionality tested with interpreters; run-through with venue prior to event).
- Contractor to develop and disseminate Summit materials such as the program, a book of abstracts, and name badges based on documents and information provided by the Project Authority. Contractor will print hard copies of the program and name badges and bring them for distribution during on-site registration.

2.1.2. Tasks on the two days of the Summit

- Contractor to liaise with the Project Authority, the venue, AV and simultaneous interpreters as needed.



- Contractor to coordinate on-site registration starting at 7:00 a.m. EST and support in-person participants (e.g., welcome, name badges, questions, logistics) on both days. A minimum of 2 people would be required at the registration desk between 7:00 and 8:30 a.m. on October 25, 2026 with at least one person remaining at the registration desk for the remainder of the day.
- Contractor to provide 3 facilitators for plenary and concurrent sessions with a requirement for at least 1 facilitator per meeting room (event will host 3 concurrent rooms). Their role would be to welcome the session participants, introduce and support presenters, and moderate Q&A. Facilitators should have experience in moderating large group discussions and experience with formats such as “World Cafes”.
- Contractor to provide at least 3 individuals to take notes during the Summit sessions (3 concurrent sessions and the plenary sessions) to inform the development of a “What We Heard” report.
- Contractor to provide 1 graphic recorder for the Summit (with possibility of requiring up to 3), if required. Graphic illustration developed by the graphic recorder to be shared with the Project Authority within 2 weeks after the close of the Summit, if required.
- Contractor to identify an Indigenous emcee for the Summit. The emcee would be responsible for welcoming/introducing Elders at the start and close of the Summit, providing short welcoming and introductory statements in plenary on Day 1 and Day 2 as well as introduce all those speaking in plenary sessions and sharing any Summit housekeeping information (location of meals, location of health supports, calling participants back from lunch etc.)
- Contractor to help set up any communications products developed by Indigenous Services Canada communications team (e.g. poster board to share comments/reflections in registration lobby area) and provide relevant supplies if needed (e.g., markers, post it notes).
- Contractor to provide tokens of appreciation (thank you gifts) for presenters. Estimate for this task should be based on approximately 150 tokens of appreciation.

2.1.3. Tasks after the Summit (post-Summit)

- Contractor to send a thank you email to Summit participants following the close of the Summit including a post-Summit survey. Email and survey to be developed by Project Authority.
- Contractor to receive and compile survey responses to be shared with Project Authority within 10 business days after the close of the survey.
- Contractor may be asked prepare a “What We Heard” report based on the notes taken during the Summit and the responses from the post-Summit survey. If requested, Report is to be provided to the Project Authority within eight weeks of close of the Summit survey.

2.2. Specifications and Standards

This is a two day hybrid event being held on October 25-26 2023 to be held in Ottawa, Ontario. The contractor will be required to be in Ottawa the day prior to the Summit in case they are requested to be at the venue for any last minute logistics/set up requirements. They are also required to be on site at the venue for both days of the Summit. The contractor will act as a point of contact for the hospitality team, the AV team, the venue and the simultaneous interpreters if there are any issues or questions related to the Summit set up and operation.

2.3. Technical, Operational and Organizational Environment

The focus of this Summit is on First Nation, Inuit and Métis mental wellness. The Department is seeking an event management company, preferably Indigenous-owned, to support the planning



and implementation of this event. Experience in planning and implementing hybrid events are an asset. Knowledge and experience in event planning and implementation for events with an Indigenous-focus and audience is required. No other technical knowledge or subject matter knowledge is required by the contractor.

The contractor will be required to have their own office or working space in which their staff will work to support the pre-Summit planning activities as well as any virtual support. They will also need their own internet connection and basic computer software to support the Department with the virtual conference activities and formatting of conference materials.

The contractor assigned to work on this project must be ready to work closely (virtually) with the Project Authority and the Department of Indigenous Services Canada employees involved in the planning of this Summit.

2.4. Method and Source of Acceptance

The Project Authority will schedule meetings with the Contractor as required to discuss the progress of the planning and implementation of the Summit. Meetings will be held via MS Teams or Zoom at a mutually convenient time. The Project Authority will raise any concerns, check-in on progress of activities and provide approval of the progress of the work with the Contractor during these meetings.

2.5. Reporting Requirements

The Project Authority will schedule meetings with the Contractor to discuss the progress of the project. During these meetings, the Project Authority and Contractor will review key activities and achievements for the planning and implementation of the Summit. If required, it is expected that the Contractor will submit an electronic copy of a "What We Heard" report within eight weeks of the close of the Summit survey.

2.6. Project Management Control Procedures

The Project Authority will assess the progress of the work to plan and implement the Summit during regularly scheduled meetings/calls with the Contractor or by requesting progress updates via email. The Project Authority will also provide feedback and may recommend revisions on the deliverables, as necessary.

3. ADDITIONAL INFORMATION

3.1. Authorities

The Project Management / Technical Authority for this contract will be Allison Vadneau. The person who will handle administration and invoicing questions will be Emma Hunt. The Contractor will communicate any questions and or issues by requesting a meeting to discuss with the Project Authority or via email directly to the Project Authority.

3.2. Canada's Obligations

The contractor will not require access to Government of Canada facilities to perform the tasks and duties outlined in this Statement of Work. All equipment, software and internet required to perform the tasks are owned, operated, managed and paid for by the contractor.



Access to employees of Indigenous Services Canada who are leading the planning of the Summit will be available to the contractor Monday to Friday from 8:00 a.m to 4:00 p.m to respond to and address any questions via virtual meetings or teleconferences. The Project Authority will be required to acknowledge via email the Contractor's request to meet within 2 business days and will schedule meeting times that are suitable and acceptable to both parties

3.3. Contractor's Obligations

The contractor will commence work upon signature of the contract and must complete the project by December 29, 2023 (providing eight weeks following the close of the Summit survey to submit the What We Heard Report and all outstanding invoices).

No equipment will be purchased by the Government of Canada to complete this project. Unless otherwise specified, the Contractor must use its own equipment and software for the performance of this Statement of Work.

The Contractor shall:

- meet all tasks, deliverables and milestones identified in Section 2.1;
- use their own equipment and software for the performance of this Statement of Work;
- submit all written materials to the Department in electronic format;
- participate in teleconferences with the Project Authority, when required;
- notify the Project Authority as soon as possible if any extensions are required on the project schedule (submission of final report).

3.4. Location of Work, Work site and Delivery Point

All pre-Summit and post- Summit work will be completed at locations secured by the Contractor. The Government of Canada is not responsible for providing any work site location or for the rental of such locations for any aspect of this project work.

3.5. Language of Work

The Contractor will complete all work in English. The Project Authority will translate products into French at its own expense.

3.6. Special Requirements

There are no special requirements for this Contract.

3.7. Insurance Requirements

The Contractor must obtain and maintain an appropriate level of professional liability insurance coverage.

3.8. Travel and Living

Travel and expenses for meals are considered eligible expenses under this Contract so as long as they pertain directly to the requirement of Contractor staff to travel to the Summit to perform the duties of this Contract. By travel we understand that the Contractor and their staff who are required to travel from their office location to the Summit and return to the office location. Payment for travel and living expenses must be made in accordance to the terms of payment and the National Joint Council Travel Directive.

4. PROJECT SCHEDULE



4.1. Expected Start and Completion Dates

The services of the Contractor will be required for a period of approximately 4 months commencing on or around September 1, 2023. The expected completion date of this project is December 29, 2023.

4.2. Schedule and Estimated Level of Effort (Work Breakdown Structure)

Due Date	Lead	Deliverable
Within one week post-contract signature	Project Authority	<ul style="list-style-type: none"> Initial meeting (by teleconference) with the Project Authority (or designate) on the project activities, timelines and deliverables. Critical path for the Summit will be shared electronically once the Contract is signed to support discussions at the initial meeting.
Within three weeks post-contract signature	Project Authority	<ul style="list-style-type: none"> Organize touch base meeting with Contractor to discuss work plan and requirements for the Summit. Update on progress and troubleshoot issues.
One month prior to the October 2023 Summit start date	Project Authority	<ul style="list-style-type: none"> Organize touch base meeting with Contractor to discuss outstanding work and issues for the Summit planning. Update on progress and troubleshoot issues.
Two weeks prior to the October 2023 Summit	Project Authority	<ul style="list-style-type: none"> Organize touch base meeting with Contractor to go over event details and ensure that all requirements for the event planning, as per work plan and critical path are met. Project Authority to troubleshoot any last minute issues with Contractor.
October 24-25-26, 2023	Contractor	<ul style="list-style-type: none"> Contractor to be present in Ottawa Ontario the day prior to the start of the Summit (October 24) and for both days of the Summit (October 25-26) to provide on site logistical support to the Project Authority.
Within one week post-October 2023 Summit	Project Authority	<ul style="list-style-type: none"> Meet virtually with the Project Authority to debrief on the Summit. Contractor to share the results of the post-Summit participant survey with the Project Authority.
Within one month post-October Summit 2023	Contractor	<ul style="list-style-type: none"> Submits all invoices requiring payment for the purpose of this Contract.



<p>On or before December 29, 2023</p>	<p>Contractor</p>	<ul style="list-style-type: none"> • Submit a “What we Heard Report” for the October 2023 Summit.
		<ul style="list-style-type: none"> • Submit all invoices requiring payment for the purpose of this Contract.

5. REQUIRED RESOURCES OR TYPES OF ROLES TO BE PERFORMED

The Contractor will be required to have the knowledge, experience and expertise in event management (conferences, summits, working groups). The Contractor must have experience in organizing in-person and virtual events. The focus of this Summit is on First Nation, Inuit and Métis mental wellness. The Department is seeking an event management company, preferably Indigenous-owned, to support the planning and implementation of this event. Knowledge and experience in event planning and implementation for events with an Indigenous-focus and audience is required. The Contractor must be able to identify individuals and/or supply staff that can perform the duties of emceeing the Summit, moderating/facilitating concurrent sessions and taking notes during the sessions. Facilitators (requirement for 3) should have experience moderating large group discussions and have experience with formats such as “World Cafes”. Knowledge and abilities required by the emcee and facilitators identified by the Contractor is someone who can welcome participants in English to the session, introduce and call upon the speakers in the order they appear in the provided agenda and moderate discussions and question/answer sessions. The emcee identified by the Contractor must have previous experience in emceeing large events. Experience emceeing Indigenous events and an emcee who is Indigenous is not required but would be considered an asset. The Contractor must also identify and supply a graphic recorder (possibly up to 3 graphic recorders) (exact length of graphic recording services TBD), if required. The graphic recording artist does not need to be Indigenous but would be considered an asset if they were Indigenous.

The Contractor will also be required to attend to the registration table in the venue lobby to welcome participants on both days, provide participants with name badges and meeting packages. Experience dealing with the general public is required and communication skills are required to assist participants with questions on the Summit agenda or schedule, as needed.

6. APPLICABLE DOCUMENTS AND GLOSSARY

6.1. Applicable Documents

Not applicable

6.2. Relevant Terms, Acronyms and Glossaries

Not applicable



ANNEX "B"
BASIS OF PAYMENT

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the work as determined in Annex – “A” – Statement of Work; to a limitation of expenditure of \$_____.

CONTRACT PERIOD: Contract Award to December 29th, 2023		
	Description	Cost
	Professional Fees (e.g. Lead coordinator, event manager, production of summary report)	\$
	Support Staff (e.g. onsite support for registration desk, delegate support, coordination with suppliers)	\$
	Materials (e.g. name badges, , pens/paper, lanyards, token of appreciation for approximately 150 presenters)	\$
	Facilitators (3 facilitators required)	\$
	Emcee	\$
	Graphic recording (cost for min. of 1 graphic recorder)	\$
	Printing (e.g.350 copies of agendas, programs)	\$
	Travel to provide on-site support	\$
	Travel support for speakers (set travel stipend for an estimated 70 speakers)	\$
	Travel support for 2 international speakers	\$
	Other costs (e.g. set up of registration system)	\$



Total Estimated Initial Contract Cost:	\$
Applicable Taxes	\$
GRAND TOTAL	\$



ANNEX "C"

SECURITY REQUIREMENTS CHECK LIST

Affaires autochtones et Développement du Nord Canada / Aboriginal Affairs and Northern Development Canada

Contract Number / Numéro du contrat: 1000252592/ Security Classification / Classification de sécurité: Unclassified

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

Form containing sections: PART A - CONTRACT INFORMATION, PART B - SAFEGUARDS OFF-SITE (COMPANY), and PART C - PERSONNEL. Includes various security questions and a summary chart table.



11.1 Personnel Security Screening Level Required: Niveau d'enquête de la sécurité du personnel requis :	<input checked="" type="checkbox"/> N/A / Non requis	<input type="checkbox"/> Reliability/ Fiabilité	<input type="checkbox"/> Confidential/ Confidentiel	<input type="checkbox"/> Secret	<input type="checkbox"/> Top Secret/ Très secret
11.2 May unscreened personnel be used for portions of work? Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail ?	<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui	N/A / Non requis		
12. 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 ?	<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui			
Government of Canada / Gouvernement du Canada					Contract Number / Numéro du contrat 1000252592 Security Classification / Classification de sécurité Unclassified

PART D – AUTHORIZATION / PARTIE D – AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) – Nom (en lettres moulées) Stephanie Rees-Tregunno		Title - Titre Manager, Mental Wellness	Signature ReesTregunno, Stephanie 0 <small>Digitally signed by Stephanie Rees-Tregunno, DN: cn=Stephanie Rees-Tregunno, ou=ISC-SAC, cn=</small>
Telephone No. – N° de téléphone 343-543-4587	Facsimile No. - N° de télécopieur N/A	E-mail address – Adresse courriel Stephanie.rees-tregunno@sac-isc.gc.ca	Date
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) – Nom (en lettres moulées) Jasmin Gauthier		Title - Titre Security in Contracting Officer	Signature Gauthier, Jasmin 0 <small>Digitally signed by Gauthier, Jasmin 0 Date: 2023.07.20 09:38:31 -0400</small>
Telephone No. – N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address – Adresse courriel jasmin.gauthier2@sac-isc.gc.ca	Date 2023-07-20
15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached? Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) – Nom (en lettres moulées) Alex Cormier Howie		Title - Titre Senior Procurement Officer	Signe <small>Digitally signed by cormierhowie, alex - DN: cn=Alex Cormier Howie, ou=ISC-SAC, cn=</small>
Telephone No. – N° de téléphone 873-354-0959	Facsimile No. - N° de télécopieur N/A	E-mail address – Adresse courriel alexander.cormierhowie@sac-isc.gc.ca	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) – Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. – N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address – Adresse courriel	Date

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
Unclassified

