





# **Request for Standing Offers (RFSO)**

**For the provision of**

**Evaluation, Performance Measurement and Special  
Studies/Review Services for Innovation, Science  
and Economic Development Canada (ISED)**

**for**

**Innovation, Science and Economic Development Canada  
(ISED)**



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## PART 1 - GENERAL INFORMATION

Set-aside under the Procurement Strategy for Indigenous Business (PSIB)

This procurement is set aside under the federal government Procurement Strategy for Indigenous Business. For more information on Indigenous business requirements of the Set-aside Program for Indigenous Business see [Annex 9.4](#) of the Supply Manual.

This procurement is set aside from the international trade agreements under the provision each has for measures with respect to Aboriginal peoples or for set-asides for small and minority businesses.

Further to Article 800 of the Canadian Free Trade Agreement (CFTA), CFTA does not apply to this procurement.

### 1.1 Introduction

This bid solicitation is divided into six parts plus annexes and, attachments 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 and states that the Bidder agrees to be bound by the clauses and conditions contained in all parts of 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, if applicable, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include the Statement of Work, the Terms of Payment, and any other annexes.

### 1.2 Summary

Innovation, Science and Economic Development Canada is seeking to establish up to eight (8) Standing Offers contracts for their Evaluation, Performance Measurement and Special Studies/Review Services for Innovation, Science and Economic Development Canada (ISED) defined in Annex A, Statement of Work, for a period of three (3) years with the irrevocable options to extend the terms of the Standing Offer by two (2) irrevocable option(s) of one (1) year under the same terms and conditions. The work is to be performed from the contract award date until December 31, 2026.

The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information and the annex titled Federal Contractors Program for Employment Equity - Certification.

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-United States-Mexico Agreement (CUSMA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

The resulting contract will not include deliveries of services within locations within that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within that are subject to CLCAs will have to be treated as a separate procurement not forming part of the bid solicitation.

### 1.3 Security Requirements

The proposed personnel of the contractors selected for Standing Offer Agreements will be required to have appropriate security clearances to access to classified or protected material. Specific levels of required security clearance will be determined by ISED on a project-by-project basis.



No pre-existing security clearances are required to submit a proposal; however, such clearances will be a pre-condition to the authorization of any work under any Standing Offer Agreement established as a result of this invitation. Without the appropriate clearance, an alternate contractor will be selected. Innovation, Science and Economic Development Canada may initiate a security screening request if the successful contractor is not security cleared at this level.

#### **1.4 Debriefings**

Bidders may request a debriefing on the results of the bid solicitation. Bidders should make the request to the Contracting Authority within ten (10) business days of receipt of the results of the bid solicitation. The debriefing may be provided in writing, by telephone or in person.



## PART 2 – INSTRUCTIONS TO BIDDERS

### 2.1 Glossary of Terms

| TERM                          | DEFINITION / MEANING   |
|-------------------------------|--|
| <b>RFSO</b>                   | Request for Standing Offer   |
| <b>ISED</b>                   | Innovation, Science and Economic Development Canada or the Department  |
| <b>Mandatory requirements</b> | Whenever the words “shall”, “must”, “will” and “mandatory” appear in this document or any related document forming a part hereof, the item being described is a mandatory requirement. Failure to comply or demonstrate compliance with a mandatory requirement will render the bid non-responsive and the bid will not be considered further. |
| <b>Should</b>                 | The word “should” means that it is “preferable to” but “not obligatory to”   |
| <b>Minister</b>               | The Minister of Innovation, Science and Economic Development.  |
| <b>Canada</b>                 | “means His Majesty the King in right of Canada as represented by the Minister of ISED and any other person duly authorized to act on behalf of that Minister”.   |
| <b>SOA</b>                    | The SOA is referencing the Standing Offer Agreement. A standing offer is an offer from a potential supplier to provide goods and/or services at pre-arranged prices, under set terms and conditions, when and if required.   |

### 2.2 General Conditions

The general conditions as set out in Innovation, Science and Economic Development Canada’s General Conditions of a Service Contract will form part of and shall be incorporated into the resulting contract. This document is available at the following website: [General Conditions of a Service Contract \(canada.ca\)](http://canada.ca).

### 2.3 Submission of Bids

2.3.1 Bids must be submitted only to Innovation, Science and Economic Development Canada’s email account, time and place indicated on page 1 of the bid solicitation. Total email file size cannot exceed the servers’ size limit (estimated at 10 MB).

2.3.2 Facsimile and Hard Copy/Courier BIDS WILL NOT BE ACCEPTED. Due to the nature of this bid solicitation, bids transmitted by facsimile to Innovation, Science and Economic Development Canada will not be accepted.

2.3.3 Canada requires that each bid, at closing time, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with Part 5 – Certifications required with the Bid.

2.3.4 It is the Bidder’s responsibility to:

- a. obtain clarification of any terms, conditions or technical requirements contained in the solicitation, if necessary, before submitting a bid;
- b. prepare its bid in accordance with the instructions contained in the bid solicitation;
- c. submit by closing date and time a signed complete bid;
- d. ensure that the Bidder’s name, return address, the bid solicitation number, and bid solicitation closing date and time are clearly visible within their submission;
- e. provide a comprehensible and sufficiently detailed bid, including all requested pricing details, that will permit a complete evaluation in accordance with the criteria set out in the bid solicitation; and
- f. include the name and telephone number of a representative who may be contacted for clarification or other matters relating to the bidder’s proposal.



- 2.3.5 Bids will remain open for acceptance for a period of not less than one hundred and twenty (120) calendar days from the closing date of the bid solicitation, unless specified otherwise in the bid solicitation. Canada reserves the right to seek an extension of the bid validity period from all responsive bidders in writing, within a minimum of three (3) business days before the end of the bid validity period. If the extension is accepted by all responsive bidders, Canada will continue with the evaluation of the bids. If the extension is not accepted by all responsive bidders, Canada will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the solicitation.
- 2.3.6 Bid documents and supporting information must only be submitted in either English or French.
- 2.3.7 It is requested that pricing information not be included in any section of the proposal other than the Financial Proposal section of your bid.
- 2.3.8 Bids received on or before the stipulated bid solicitation closing date and time will become the property of Canada and will not be returned. All bids will be treated as confidential, subject to the provisions of the *Access to Information Act*, R.S. 1985, c.A-1 and the *Privacy Act*, R.S. 1985, c. P-21, international obligations and judicial order.
- 2.3.9 Unless specified otherwise in the bid solicitation, Canada will evaluate only the documentation provided with a bidder's proposal. Canada will not evaluate information such as references to Website addresses where additional information can be found, or technical manuals or brochures not submitted with the bid.

## 2.4 Communications - Solicitation Period

- 2.4.1 To ensure the integrity of the competitive bid process, enquiries and other communications regarding the bid solicitation must be directed only to the Contracting Authorities identified in the bid solicitation. Failure to comply with the request may result in the bid being declared non-responsive.

## 2.5 Enquiries – Bid Solicitation

- 2.5.1 All enquiries regarding this bid solicitation must be submitted in writing to the Contracting Authority named below as early as possible within the solicitation period to allow sufficient time to provide a response. All enquiries must be submitted in writing no later than five (5) business days before the bid closing date. Enquiries received after that time may not be answered.

The Contracting Authorities are:

Name: Davis Opie  
Title: Sr. Contracts and Procurement Advisor  
Email address: Davis.Opie@ised-isde.gc.ca  
Telephone Number: 613-324-9165

Name: Sophie Montminy  
Title: Contracts and Procurement Agent  
Email address: Sophie.Montminy@ised-isde.gc.ca  
Telephone Number: 613-220-7532

- 2.5.2 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 proprietary in 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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders.





- 2.5.3 To ensure consistency and quality of information provided to Bidders, the Contracting Authority will simultaneously distribute any information with respect to significant enquiries received and the replies to such enquiries without revealing the sources of the enquiries.
- 2.5.4 Meetings will not be held with individual Bidders prior to the closing date and time of this RFSO.
- 2.5.5 Notwithstanding the Rights of Canada, amendments to the Bidder's proposal will not be accepted after the RFSO closing date and time.

## **2.6 Applicable Laws**

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

## **2.7 Rights of Canada**

Canada reserves the right to:

- a. reject any or all bids received in response to the bid solicitation;
- b. enter into negotiations with bidders on any or all aspects of their bids;
- c. accept any bid in whole or in part without negotiations;
- d. cancel the bid solicitation at any time;
- e. reissue the bid solicitation;
- f. if no responsive bids are received and the requirement is not substantially modified, re-tender the requirement by inviting only the bidders who bid to re-submit bids within a period designated by Canada;
- g. negotiate with the sole responsive Bidder to ensure best value to Canada;
- h. accept, or waive, a non-material error of form in a Bidder's proposal or, where practical to do so, request a Bidder to correct a non-material error of form in the Bidder's proposal provided there is no change in the price quoted;
- i. award more than one contract for the requirement if it is determined that no single proposal satisfies the project objectives; and
- j. retain all proposals submitted in response to this bid solicitation.

## **2.8 Price Support**

In the event that the Bidder's proposal is the sole responsive bid received, the Bidder must provide, on Canada's request, one or more of the following price support if applicable:

- a. a current published price list indicating the percentage discount available to Canada; or
- b. copies of paid invoices for the like quality and quantity of the goods, services or both sold to other customers; or
- c. price or rate certifications; or
- d. any other supporting documentation as requested by Canada.

## **2.9 Bid Costs**

No payment will be made for costs incurred in the preparation and submission of a bid in response to the bid solicitation. Costs associated with preparing and submitting a bid as well as any costs incurred by the Bidder associated with the evaluation of the bid, are the sole responsibility of the Bidder.

## **2.10 Conduct of Evaluation**



In conducting its evaluation of the bids, Canada may, but will have no obligation to, do the following:

- a. seek clarification or verification from bidders regarding any or all information provided by them with respect to the bid solicitation;
- b. contact any or all references supplied by Bidders to verify and validate any information submitted by them.;
- c. request, before award of any contract, specific information with respect to Bidder's legal status;
- d. conduct a survey of Bidder's facilities and/or examine their technical, managerial, and financial capabilities to determine if they are adequate to meet the requirements of the bid solicitation;
- e. correct any error in the extended pricing of bids by using unit pricing and any error in quantities in bids to reflect the quantities stated in the bid solicitation;
- f. verify any information provided by Bidders through independent research, use of any government resources or by contacting third parties;
- g. interview, at the sole costs of bidders, any bidder and/or any or all of the resources proposed by Bidders to fulfil the requirement of the bid solicitation.

Bidders will have the number of days specified in the request by the Contracting Authority to comply with any request related to any of the above items. Failure to comply with the request may result in the bid being declared non-responsive.

## 2.11 Conflict of Interest – Unfair Advantage

2.11.1 In order to protect the integrity of the procurement process, Bidders are advised that Canada may reject a bid in the following circumstances:

- a. if the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation;
- b. if the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in Canada's opinion, give the Bidder an unfair advantage.

2.11.2 The experience acquired by a Bidder who is providing or has provided the goods and/or services described in the bid solicitation (or similar goods and/or services) will not, in itself, be considered by Canada as conferring an unfair advantage or creating a conflict of interest. This Bidder remains however subject to the criteria established above.

2.11.3 Where Canada intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the Contracting Authority before bid closing. By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within Canada's sole discretion to determine whether a conflict of interest or unfair advantage exists.

## 2.12 Entire Requirement

The bid solicitation documents contain all the requirements relating to the solicitation. Any other information or documentation provided to or obtained by a bidder from any source are not relevant. Bidders should not assume that practices used under previous contracts will continue, unless they are described in the bid solicitation. Bidders should also not assume that their existing capabilities meet the requirements of the bid solicitation simply because they have met previous requirements.

## 2.13 Bid Challenge and Recourse Mechanisms

- a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:



- Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- c) Suppliers should note that there are strict deadlines for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

## 2.14 Integrity Provisions - Bid

1. The [Ineligibility and Suspension Policy](#) (the “Policy”) in effect on the date the bid solicitation is issued, and all related Directives in effect on that date, are incorporated by reference into, and form a binding part of the bid solicitation. The Bidder must comply with the Policy and Directives, which can be found at [Ineligibility and Suspension Policy](#).
2. Under the Policy, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC’s Integrity Database. The Policy describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the bid solicitation, the Bidder must provide the following:
  - a. by the time stated in the Policy, all information required by the Policy described under the heading “Information to be Provided when Bidding, Contracting or Entering into a Real Property Agreement”; and
  - b. with its bid, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
4. Subject to subsection 5, by submitting a bid in response to this bid solicitation, the Bidder certifies that:
  - a. it has read and understands the [Ineligibility and Suspension Policy](#);
  - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the Policy, will or may result in a determination of ineligibility or suspension under the Policy;
  - c. it is aware that Canada may request additional information, certifications, and validations from the Bidder or a third party for purposes of making a determination of ineligibility or suspension;
  - d. it has provided with its bid a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the Policy;
  - e. none of the domestic criminal offences, and other circumstances, described in the Policy that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
  - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Bidder is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the Policy, Canada may also determine the Bidder to be ineligible for award of a contract for providing a false or misleading certification or declaration.



### PART 3 – BID PREPARATION INSTRUCTIONS

#### 3.1 Bid Preparation Instructions

Bids **must** be submitted to ISED at the attention of the Contracting Authority by the date, time and to the location indicated on page 1 of the bid solicitation: [cmmbidreceiving-receptiondesoffrescgm@ised-isde.gc.ca](mailto:cmmbidreceiving-receptiondesoffrescgm@ised-isde.gc.ca)

Bids received after the closing date and/or time will not be considered and will be returned unopened.

Due to bids being transmitted by electronic mail, Canada will not be responsible for late bids received at destination after the closing date and time, even if it was submitted before.

Canada requests that Bidders prepare and submit their formal proposal as four (4) separate documents as follows:

|              |                        |   |
|--------------|------------------------|---|
| Section I:   | Technical Bid          | One (1) electronic copy (by email )     |
| Section II:  | Financial Bid          | One (1) electronic copy (by email only) |
| Section III: | Certifications         | One (1) electronic copy (by email only) |
| Section IV:  | Additional Information | One (1) electronic copy (by email only) |

The maximum size of an email: **10 MB.**

Due to the nature of the bid solicitation, bids transmitted by facsimile or courier will not be accepted.

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

- (a) use a numbering system that corresponds to the bid solicitation.

#### Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capacity 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, and 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.

**Resumes for proposed resources:** Unless specified otherwise in the RFSO, the technical bid must include resumes for the consultant(s) identified in the bid solicitation that demonstrate that each proposed individual meets the requirement(s).

**Education:** Academic Certification (Degree, etc.) must be obtained through a recognized academic institution in the field of expertise.

\*The list of recognized organizations can be found under the [Canadian Information Centre for International Credentials web site](#).



**ATTACHMENT 1 TO PART 3  
PRICING SCHEDULE**

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below its quoted all-inclusive fixed daily rate (in Can \$) for each of the resource categories identified.

The volumetric data included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

The rates included in this pricing schedule includes the total estimated cost of any travel and living expenses that may need to be incurred inside the National Capital Region (NCR) defined in the [National Capital Act \(R.S.C., 1985, c. N-4\)](https://laws-lois.justice.gc.ca/eng/acts/n-4/), available on the Justice Website (<https://laws-lois.justice.gc.ca/eng/acts/n-4/>).

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

| <b>PRICING SCHEDULE 1 – PROFESSIONAL FEES</b>    |   |  |
|--|---|--|
| <b>1</b>   | <b>Period 1 – Initial Contract Period (January 1, 2024 – December 31, 2026)</b> |  |
|  | <b>Category and Level</b>   | <b>All-inclusive fixed Per Diem Rate</b> |
|  |   | <b>A</b>                                 |
| 1a   | Partner/Principal/Project Director  |  |
| 1b   | Senior Consultant/Research Analyst  |  |
| 1c   | Junior Consultant/Research Analyst  |  |
| <b>Pricing Schedule 1 Total (excluding tax):</b> |   |  |

| <b>PRICING SCHEDULE 2 – PROFESSIONAL FEES</b>    |   |  |
|--|---|--|
| <b>1</b>   | <b>Period 2 – Option Period 1 (January 1, 2027 – December 31, 2027)</b> |  |
|  | <b>Category and Level</b>   | <b>All-inclusive fixed Per Diem Rate</b> |
|  |   | <b>A</b>                                 |
| 1a   | Partner/Principal/Project Director                                      |  |
| 1b   | Senior Consultant/Research Analyst                                      |  |
| 1c   | Junior Consultant/Research Analyst                                      |  |
| <b>Pricing Schedule 1 Total (excluding tax):</b> |   |  |



| <b>PRICING SCHEDULE 3 – PROFESSIONAL FEES</b>    |   |  |
|--|---|--|
| <b>1</b>   | <b>Period 3 – Option Period 2 (January 1, 2028 – December 31, 2028)</b> |  |
|  | <b>Category and Level</b>   | <b>All-inclusive fixed Per Diem Rate</b> |
|  |   | <b>A</b>                                 |
| 1a   | Partner/Principal/Project Director                                      |  |
| 1b   | Senior Consultant/Research Analyst                                      |  |
| 1c   | Junior Consultant/Research Analyst                                      |  |
| <b>Pricing Schedule 1 Total (excluding tax):</b> |   |  |



**PART 4 SECTION 1 – EVALUATION PROCEDURES**  
**ATTACHMENT 1 TO PART 4, EVALUATION CRITERIA, CONTAIN ADDITIONAL INSTRUCTIONS THAT**  
**BIDDERS SHOULD CONSIDER WHEN PREPARING THEIR TECHNICAL BID.**

**Section II: Financial Bid**

The financial bid **must** be submitted as a separate file to the technical bid.

Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.

Bidders must submit their price(s) and/or rate(s), FOB destination; Canadian customs duties and excise taxes included, as applicable.

Any applicable taxes are to be shown separately.

**Electronic Payment of Invoices - Bid**

Canada requests that the Bidder :

A) select Option 1 or, if applicable, Option 2 below; and  
(B) insert in Section II of its bid the option selected.

Acceptance of electronic payment instruments will not be considered as an evaluation criterion.

**Option 1**

The Bidder accepts to be paid using the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

**Option 2**

( ) Bidder declines to be paid by electronic payment instruments.



### Section III: Certifications

Bidders must submit the certifications required under Part 5.

### Section IV: Additional Information

In section IV of their bid, Bidders should provide the following information:

1. their legal name;
2. their Procurement Business Number (PBN) (for additional information on how to register to obtain a PBN, refer to the following website: <https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/register-as-a-supplier> );
3. their complete mailing address;
4. the name of the contact person (including this person's mailing address, phone number and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
5. To allow for proper validation of the bidder's proposed resource(s)' security clearance(s), the Bidder should provide the following information for each of their proposed resources:
  - a. full name; and
  - b. file number.

## 2. Accessibility Standards

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

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





## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures (Highest Combined Technical Merit and Price)**

- 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 comprised of representatives of Canada will evaluate the bids.

**4.1.1** The Bidder must provide the necessary documentation to demonstrate compliance with this requirement.

(a) The Bidder/Firm is advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will **not** constitute "demonstrated" for the purpose of the evaluation

(b) The Bidder/Firm must clearly demonstrate in the proposal how the experience was gained or knowledge was attained, supported by resumes and any necessary supporting documentation

(c) The Bidder/Firm must provide complete details as to where, when and how (through which activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the bidder must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum). In the case where the timelines of two or more projects or experience overlap, the duration of time common to each project/experience will not normally be counted more than once

(d) It is recommended that the Bidder/Firm include a grid in their proposals, cross-referring statements of compliance with the supporting data and resume evidence contained in their proposals. Note: the compliance grid, by itself DOES NOT constitute demonstrated evidence.

### **4.2 Technical Criteria**

#### **4.2.1 Mandatory Criteria**

Refer to Attachment 1 to Part 4.

#### **4.2.2 Point Rated Technical Criteria**

Refer to Attachment 1 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

#### **4.2.3 Financial Evaluation**

For bid evaluation and contractor(s) selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

### **4.3 Financial Mandatory Criteria**

Refer to Attachment 1 to Part 4.

### **4.4 Basis of Selection - Basis of Selection - Highest Combined Rating of Technical Merit (80 %) and Price (20 %)**

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

2. Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.



- 3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80% for the technical merit and 20% 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 80%.
- 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20%.
- 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 Standing Offer.
- 8. To determine the combined rating of technical merit and price of each proposal, the following calculation shall be used:

$$1. \quad \frac{\text{Overall score obtained in the rated criteria}}{\text{xxx}} \times 80\% = (\text{Total \#1})$$

$$2. \quad \frac{\text{Lowest responsive assessed price}}{\text{Bidder's total assessed price}} \times 20\% = (\text{Total \#2})$$

(Total #1) + (Total #2) = Combined rating of technical merit and price

**\*\*Note: For evaluation purposes, the Bidders' financial proposal will be a total of the three resource categories during the initial contract period averaged out.\*\***

#### 4.5 Standing Offer Agreement

4.5.1 It is expected that up to eight (8) Standing Offer Agreements (SOA) will be established as a result of this request for proposals. The SOA shall be in effect for an initial period of three (3) years with two (2) potential one (1) year Standing Offer extension periods.

4.5.2 It is anticipated that \$ 4,500,000.00 will be available over the initial SOA period for authorizing all work under the SOA system being established. Estimated expenditures for the remaining two (2) one (1) year optional periods of SOA is estimated at \$1,500,000.00 each year. For the total period of the Standing Offer Agreements, total expenditures shall not exceed \$7,500,000.00 plus applicable taxes.

4.5.3 Any standing offer agreement established as a result of this proposal invitation shall contain the following clause:

"This document is a STANDING OFFER whereby the Contractor offers to provide the work detailed herein, at the prices and on the terms and conditions set out herein, to His Majesty and when His Majesty may require such work and if His Majesty authorizes and orders such work in accordance with the provisions herein."

It is understood and agreed that:

- (a) a contractual obligation will arise when work is authorized against the Standing Offer by issuance of a call-up against a standing offer and only to the extent designated in the authorization;



(b) this Standing Offer does not oblige Innovation, Science and Economic Development Canada to authorize or order any work whatsoever;

(c) Innovation Science and Economic Development Canada's liability under this arrangement shall be limited to the actual work authorized and performed in accordance with the terms and conditions specified in the Standing Offer and the call-up;

(d) the general terms and conditions set out in Innovation Science and Economic Development Canada's General Terms and Conditions will form part of and be incorporated into any and all Standing Offers and call-ups.

#### **4.6 Work Authorization**

Work under this Standing Offer Agreement will be authorized as follows:

(a) The Project Authority will provide the Contractor(s) with a description of the work to be performed under the Standing Offer in sufficient detail to enable the Contractor to establish a firm price for the work.

(b) The selected Contractors shall submit to the Project Authority a brief work plan, schedule and firm price with supporting details or other method of basis of payment depending on the nature of the project.

(c) The assignments will be for a firm price. However, whenever the requirements/ statement of work cannot be well defined, the Project Authority may pre-authorize a time-rate payment, i.e. per diem rate, in lieu of a firm price.

(d) The work plan, schedule and firm price can be subject to negotiation between the Contractor and the Project Authority.

(e) Authorization to proceed with the work will be made by issuance of a call-up against a standing offer duly signed by the Contracting Authority and the Project Authority.

Call-up Offer Limit - Each call-up offer resulting from the Request for Standing Offer for Bidding Agreements (RFSO) must not exceed \$250,000.00, including applicable taxes.

#### **4.7 Addition of Qualified Suppliers and Refresh Option**

For the purpose of meeting the service requirements identified in this RFSO, ISED reserves the right to offer a SOA to any supplier that has submitted a bid and has met the requirements of the original RFSO. For this to happen, the supplier must continue to meet the requirements of the RFSO at the time of any offer.

Also, ISED may, at its option and at any point during the SO validity period (the initial period or any of the optional extension periods), re-post the RFSO on the Government Electronic Tendering System (GETS). This would permit additional suppliers to qualify and be added to the SO holder list with ISED. Proposals will be subject to the same qualification requirements as those required in the original RFSO process.

No existing SO holder will be removed from the SO holder list because of the addition of any new qualified suppliers. Reposting of the RFSO would only occur if ISED considers their list to be inadequate for their purposes.



**ATTACHMENT 1 TO PART 4  
EVALUATION CRITERIA**

**1.0 Mandatory Technical Criteria**

The Offer must comply with the mandatory technical criteria specified below. The Offeror must provide in their proposal the necessary documentation to support and demonstrate compliance with the mandatory technical criteria.

Offers which fail to meet the mandatory technical criteria will be declared non-responsive and will receive no further evaluation. Each mandatory technical criteria must be addressed separately.

| <b>RFP Reference</b> | <b>Mandatory Requirement<br/>(Bidder's proposal should repeat exactly as defined in the RFP)</b>  | <b>Pass / Fail</b> | <b>Referenced Section/Page in Bidder's Proposal</b> |
|----------------------|---|--------------------|---|
| <b>MT1</b>           | <p>The Bidder (refers to the firm and its proposed resources) must demonstrate experience providing Evaluation, Review and Performance Measurement Services.</p> <p>Using the template in <b>Annex C</b>, the Bidder must provide an overview of the evaluation, review, and performance measurement work they have undertaken over the past five years; (since January 2018). Projects need not be specific to ISED. For each project, the Bidder must include: a brief description of the project and activities undertaken, a description of the methodologies used, project start and end dates, and the client contact name and telephone number.</p> <p>A separate template should be completed of each project. Each description should not exceed two (2) pages in length. Provide a representative sample over the past five years (maximum of ten examples may be provided). At least two projects must have been for a federal government client. Innovation, Science and Economic Development Canada may cease its evaluation of the description after two pages.</p> |                    |   |
| <b>MT2</b>           | <p>The Bidder (refers to the firm and its proposed resources) must demonstrate the ability to manage and conduct complex evaluation projects.</p> <p>Using the template in <b>Annex D</b>, , the bidder must submit project summaries for <b>two (2)</b> evaluation projects they have led over the past five years (since January 2018). A separate template must be completed for each project. Each description should not exceed two (2) pages in length. Innovation, Science and Economic Development Canada may cease its evaluation of the description after two pages.</p>  |                    |   |
| <b>MT3</b>           | <p>The Bidder must provide curriculum vitae (C.V.) of all proposed personnel who will participate in the projects, including the partner/principal/project director.</p> <p>The C.V.s must include (under clear headings):</p> <ol style="list-style-type: none"> <li>1. Academic and professional qualifications as set out in Section 7.1 of <b>Annex A</b>.</li> <li>2. Descriptions of specific experience relating to evaluation and/or performance measurement and their associated elements as per Section 6.0 of Annex A. These descriptions must identify when,</li> </ol>   |                    |   |



|            |   |  |  |
|------------|---|--|--|
|            | <p>where and how the experience was obtained.</p> <p>3. Descriptions of specific experience representative of the areas of interest to Innovation, Science and Economic Development Canada (see Section 14.1 for list of areas of interest)</p> <p>The Bidder must also complete the Personnel Summary Table (<b>Annex E</b>), outlining how all proposed personnel meet the minimum qualifications set out in Section 7.1 of <b>Annex A</b>.</p> |  |  |
| <b>MT4</b> | <p>Security clearance levels (and the expiry date) of all personnel identified in the proposal must be provided and clearly indicated on the Personnel Summary Table.</p> <p>Bidders must indicate acceptance of Section 12.0 of <b>Annex A</b>. No pre-existing clearances are required to submit a proposal.</p>  |  |  |
| <b>MT5</b> | <p>The Bidder must provide a written statement certifying that they are capable of providing services in both official languages. The statement must clearly identify the Bidder's capability to undertake data collection methods in both languages.</p>   |  |  |

## 2.0 Point Rated Technical Criteria

In order to qualify for the rating process, proposals MUST respond to the following rated requirements IN THE ORDER SHOWN and MUST include the referenced Section/Page in the Bidder's proposal, together with the associated summary tables as requested.

**Bidders must achieve a minimum of 60% on each of the following point-rated requirement areas:**

- Program evaluations of relevance to ISED;
- Evaluation studies utilizing various qualitative and quantitative approaches;
- Experience in utilizing a specific qualitative and quantitative methodology;
- Capabilities to conduct surveys as part of an evaluation study;
- Performance Measurement Strategy / Performance Information Profile components;
- Project management and coordinated approach; and,
- Writing high-quality evaluation reports

Any proposal which fails to achieve the required minimum score for any rated item will be eliminated from further consideration. **In addition, the bidder's proposal must achieve an overall minimum rating of 70% on all point-rated requirements.** Innovation, Science and Economic Development Canada may choose to terminate the evaluation upon the first non-compliance with a rated requirement.



| RFP Reference                | Point-rated Requirements<br>(Bidder's proposal should repeat exactly as defined in RFP) Technical Rating  | Min Points | Max Points | Reference Section/<br>Page in Bidder's Proposal |
|------------------------------|---|------------|------------|---|
| <b>THE FIRM (120 points)</b> |   |            |            |   |
| <b>Experience</b>            |   |            |            |   |
| RT1                          | <p>The Bidder (refers to the firm and its proposed resources) should demonstrate experience in conducting <b>evaluations</b> in areas relevant to Innovation, Science and Economic Development Canada .</p> <p>Using the Project Summary Form in <b>Annex F</b>, the Bidder should submit summaries of program evaluation projects they have led over the past five years (since January 2018) in areas relevant to ISED, as identified in the following areas:</p> <ul style="list-style-type: none"> <li>• Transfer Payment Programs (e.g., grants, contributions)</li> <li>• Non-Transfer Payment Programs, including regulatory, legislative or policy programs and initiatives.</li> <li>• Science, technology and innovation research programs</li> <li>• Industrial sector development and/or competitiveness</li> <li>• Commercialization and/or technology adoption</li> <li>• Business financing and/or loans</li> <li>• Clean Technology and clean growth</li> <li>• Spectrum management</li> <li>• Under-Represented Entrepreneur Programs</li> <li>• Talent Development Programs</li> </ul> <p><b>Evaluation:</b> The Bidder will receive points based on the number of evaluations they have completed in areas relevant to ISED. A minimum passing score will be awarded to bidders who have completed evaluations in at least <b>three (3)</b> areas relevant to ISED. <b>Two (2)</b> additional points will be given for each additional area of relevance in which the Bidder demonstrates evaluation experience (up to a maximum of 25 points).</p> <p><b>Note:</b> Projects need not be specific to ISED. One project may cover multiple areas of relevance. Areas of relevance that are identified in multiple projects will only be awarded points once. Each description should not exceed two (2) pages in length. Innovation, Science and Economic Development Canada may cease its evaluation of the description after two pages.</p> | <b>15</b>  | <b>25</b>  |   |



|                   |   |  |  |  |
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| <p><b>RT2</b></p> | <p>The Bidder (refers to the firm and its proposed resources) should demonstrate recent experience (within the past 5 years) undertaking various qualitative and quantitative methodologies in Program Evaluations.</p> <p>This experience will be rated against <b>three (3)</b> evaluations. Using <b>Annex G</b>, the Bidder should submit a project summary for each evaluation, detailing the methodologies employed for that project. A separate template should be completed of each project. Each description should not exceed five (5) pages in length.</p> <p>Qualitative Methodologies could include:</p> <ul style="list-style-type: none"> <li>• Literature Reviews</li> <li>• Document Reviews/file reviews</li> <li>• Key Informant Interviews</li> <li>• Case Studies</li> <li>• Focus Groups</li> </ul> <p>Quantitative Methodologies could include:</p> <ul style="list-style-type: none"> <li>• Cost-Benefit Analysis</li> <li>• Econometric Analysis</li> <li>• Statistical Analysis</li> <li>• Data Management Strategies</li> <li>• Surveys</li> <li>• Bibliometric/Citation Analysis</li> </ul> <p><b>Evaluation:</b><br/>Bidders will be awarded a minimum passing score for demonstrating the use of at least <b>four (4)</b> of the above noted methodologies.<br/>Bidders will receive an additional 2 points for each additional methodology that the bidder demonstrates experience in using, to a maximum of 36 points.</p> <p><b>Note:</b> Methodologies used in multiple evaluations will only receive points once.</p> <p>Up to 4 points will be awarded for demonstrating experience in using a mix of qualitative and quantitative methodologies:</p> | <p style="text-align: center;"><b>24</b></p> | <p style="text-align: center;"><b>40</b></p> |  |
|-------------------|---|--|--|--|





|                   |   |          |           |  |
|-------------------|---|----------|-----------|--|
| <p><b>RT3</b></p> | <p>The Bidder (refers to the firm and its proposed resources) should demonstrate recent experience (within the past 5 years) undertaking a specific qualitative or quantitative methodology as a separate technical study or report.</p> <p>Bidders should submit <b>one (1)</b> complete technical report in <b>one (1)</b> of the qualitative or quantitative methodology that was produced as a stand-alone product. This product could have been a single study contract or part of a program evaluation for which there was a deliverable for a technical report.</p> <p><b>Evaluation:</b></p> <p>Technical reports will be evaluated based on the extent to which:</p> <ul style="list-style-type: none"> <li>• Elements under study are well-defined</li> <li>• Data collection methodologies are sound</li> <li>• Data limitations and mitigation strategies are identified</li> <li>• Data analysis is sound</li> <li>• Key findings or recommended approach is based on sound analysis</li> </ul> <p>Each of the above criteria will be assigned a score between 0 and 3; with 0 = weak; 1 = fair; 2 = good; 3 = strong.</p>   | <p>9</p> | <p>15</p> |  |
| <p><b>RT4</b></p> | <p>The Bidder should describe their firm’s survey capabilities, including software used, data server location, level of dedicated staff, the population size that can be managed, analysis capabilities and quality control measures. This description must address capability for both web-based and telephone surveys.</p> <p>If the Bidder does not have the capability to undertake telephone or web-based surveys in their own firm, they should provide a statement describing how they have provided such a service in the past, or how they could provide such a service in the future.</p> <p><b>Evaluation:</b></p> <p>Bidders will receive minimum points if they demonstrate a sound approach to undertaking surveys if their firm does not have the capacity.</p> <p>Additional points (up to a maximum of 10 points) will be received if the bidder demonstrates that they have in-house capacity to conduct surveys. Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• Ability to conduct web-based in-house = 7 points</li> <li>• Ability to conduct telephone-based surveys in-house <b>of populations less than 500</b> = 8 points</li> <li>• Ability to conduct telephone-based surveys in-house <b>of populations greater than 500 = 9 points</b></li> </ul> <p>An additional 1 point will be awarded to Bidders who demonstrate dedicated in-house staff and/or software for the purposes of conducting surveys.</p> | <p>6</p> | <p>10</p> |  |
| <p><b>RT5</b></p> | <p>The Bidder (refers to the firm and its proposed resources) should demonstrate recent experience (Since 2018) in developing various components of performance measurement strategies, performance information profiles and data strategies. The Bidder must submit examples of completed reports demonstrating experience in completing the performance measurement components below.</p>   |          |           |  |





|   |   |    |  |
|---|---|----|--|
| <p>These elements may have been done as standalone reports or combined together in a single document (e.g. Performance Measurement Strategy or Performance Information Profile).</p> <p>These elements could include:</p> <ul style="list-style-type: none"> <li>• Logic Models and/or Theory of Change models</li> <li>• Performance measures</li> <li>• Data Strategies</li> <li>• Evaluation Framework / Needs</li> </ul> <p><b><u>Evaluation:</u></b></p> <p>A minimum passing score will be awarded to bidders who have demonstrated sound experience in at least two <b>(2)</b> components (9 points). Three <b>(3)</b> additional points will be given for each additional component in which the Bidder demonstrates sound experience (up to a maximum of 15 points).</p> <p><b>Logic Models and/or Theory of Change Models</b></p> <ul style="list-style-type: none"> <li>• Main components of a logic model are present (activities, outputs, and immediate, intermediate and ultimate outcomes); outcomes state an expected change and are measurable.</li> <li>• Linkages between components are logical.</li> </ul> <p><b>Performance Indicators and Measures</b></p> <ul style="list-style-type: none"> <li>• Indicators clearly link to outputs and outcomes.</li> <li>• Indicators include a mix of quantitative and qualitative performance measures.</li> </ul> <p><b>Data Strategies</b></p> <ul style="list-style-type: none"> <li>• Clear and logical with a strategy/plan for handling the data created, stored, managed and processed by an organization and the ability to communicate findings and results.</li> <li>• Technical and statistical work required to process, prepare and analyse data.</li> </ul> <p><b>Evaluation Framework / Needs</b></p> <ul style="list-style-type: none"> <li>• Evaluation questions address issues of relevance and performance,</li> </ul> <p>Key components of an evaluation framework are in place</p> <p><b>Note:</b> The Bidder need not submit a separate report for each of the four components. One report may be submitted covering all four components. If multiple reports are submitted, the Bidder must clearly identify which report they wish to have assessed for each component. Components contained in multiple reports will only receive points once.</p> | 9 | 15 |  |
|---|---|----|--|



|  |   |                  |                   |  |
|--|---|------------------|-------------------|--|
| <p><b>RT6</b></p>                        | <p>Bidder should describe its firm’s overall approach to project management, coordination and liaison with the project authority.</p> <p>Bidders should describe (no more than one page for each element below) how they ensure:</p> <ul style="list-style-type: none"> <li>• effective use of resources, including transition and backup of resources</li> <li>• quality control processes</li> <li>• approaches for managing contingencies</li> <li>• approaches for ensuring clear and concise evaluation reports</li> <li>• informing the project authority during project work</li> </ul> <p><b><u>Evaluation:</u></b><br/>Bidders will be evaluated based on demonstrating a sound management approach for each element (1 point per element that is clearly described).</p>  | <p><b>3</b></p>  | <p><b>5</b></p>   |  |
| <p><b>RT7</b></p>                        | <p>The Bidder should demonstrate they are capable of producing high-quality evaluation reports. The Bidder should submit <b>one (1)</b> final evaluation report written by the firm.</p> <p><b><u>Evaluation:</u></b><br/>The Evaluation Report will be assessed on the extent to which:</p> <ul style="list-style-type: none"> <li>• the report is concise, clearly written, and provides the information necessary to understand the program, findings, conclusions and recommendations</li> <li>• Findings are credible, based on evidence presented in the report, and clearly link to the evaluation issues and questions</li> <li>• Conclusions flow logically from the evaluation findings</li> <li>• Recommendations are clear, realistic and actionable</li> <li>• Errors in grammar, syntax and formatting are minimized</li> </ul> | <p><b>6</b></p>  | <p><b>10</b></p>  |  |
| <p><b>Overall Technical Scoring:</b></p> |   | <p><b>84</b></p> | <p><b>120</b></p> |  |



## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION TO BE AWARDED A CONTRACT**

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.

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 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 Certification and Additional Information at Bid Submission**

The certifications included in Attachment 1 to Part 5, Certification Requirements, should be completed and submitted with the bid. If any of these required certifications and/or additional information is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.



## ATTACHMENT 1 TO PART 5 CERTIFICATIONS AND ADDITIONAL INFORMATION

### 1.0 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, offerors must provide the information required below before the issuance of a standing offer. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror 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 offer 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 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 FPS 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.

If the answer to the question and, as applicable, the information are not submitted in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

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: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

A contract for the services of a FPS who has been retired for less than one year and who is in receipt of a pension as defined above is subject to a fee abatement formula, as required by Treasury Board Policy.



### 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.

If the answer to the question and, as applicable, the information are not submitted in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

## 2.0 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "*FCP Limited Eligibility to Bid*" list ([http://publiservice.gc.ca/services/fcp-pcf/index\\_f.htm](http://publiservice.gc.ca/services/fcp-pcf/index_f.htm)) available from *Human Resources and Skills Development Canada (HRSDC) - Labour's* website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "*FCP Limited Eligibility to Bid*" list at the time of contract award.

## 3.0 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

## 4.0 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.



\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

**5.0 Joint Venture**

**Definition of joint venture**

A joint venture is an association of two or more parties who combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise. Joint ventures may be carried on in a variety of legal forms divided into three categories:

- (a) the incorporated joint venture;
- (b) the partnership venture;
- (c) the contractual joint venture where the parties combine their resources in the furtherance of a single business enterprise without actual partnership or corporate designation.

The joint venture team arrangement is to be distinguished from other types of contractor arrangements, such as:

- (a) prime contractor, in which, for example, the purchasing agency contracts directly with a contractor (prime) who acts as the system assembler and integrator, with major components, assemblies and subsystems normally subcontracted;
- (b) associated contractor, in which for example, the purchasing agency contracts directly with each of the major component suppliers and performs the integration tasks or awards a separate contract for this purpose.

Bidders are requested to place a check mark in the applicable box below to confirm whether the bidding entity is/is not a joint venture in accordance with the definition above.

YES the proposal is submitted as a joint venture

NO the proposal is not submitted as a joint venture

\_\_\_\_\_  
Signature

It is requested to the Bidder who bid as a joint venture to complete the certification below with the following information:

1. Type of joint venture (check mark applicable box):

|                          |                                   |
|--------------------------|-----------------------------------|
| <input type="checkbox"/> | incorporated joint venture        |
| <input type="checkbox"/> | Limited partnership joint venture |
| <input type="checkbox"/> | Partnership joint venture         |
| <input type="checkbox"/> | contractual joint venture         |
| <input type="checkbox"/> | other                             |



This certification must be signed by all members of the joint venture unless a representative of the joint venture has been appointed to represent all members of the joint venture.

The Contracting Authority may, at any time, require each member of the joint venture to confirm that the representative has been appointed with full authority to act as its representative for the purposes of the proposal and any resulting contract. If a contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarity liable for the performance of any resulting contract.

Signature of all members of the joint venture or of the representative of the joint venture, as applicable:

| Company Name | Print Name | Signature | Date |
|--------------|------------|-----------|------|
|              |            |           |      |
|              |            |           |      |
|              |            |           |      |

2. Composition of joint venture: (names and addresses of all members of the joint venture and the Procurement Business Number (PBN) of each member of the joint venture):

| Name and address of each member of the joint venture | Procurement Business Number (PBN) |
|--|-----------------------------------|
|  |                                   |
|  |                                   |
|  |                                   |
|  |                                   |

3. The name of the representative of the joint venture, i.e., the member appointed by the other members to act on their behalf:

\_\_\_\_\_

(Print Name)

4. The name of the joint venture (or the name of the company appointed to represent all members of the joint venture should a contract be awarded):

\_\_\_\_\_

(Print Name)



## **PART 6 – RESULTING CONTRACT CLAUSES**

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

### **6.1 General Conditions**

Innovation, Science and Economic Development Canada's [General Conditions of a Service Contract](#) apply to and form part the contract.

### **6.2 Security Requirement**

**6.2.1** The following security requirements apply and form part of the RFSO.

At the Standing Offer award date, the following conditions **must** be met:

(a) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as outlined by the individual Call-up request;

(b) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

**6.2.2** For additional information on security requirements, bidders should refer to the Industrial Security Program (ISP) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

### **6.3 Statement of Work**

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

### **6.4 Term of the Standing Offer Agreement**

#### **6.4.1 Period of Work**

The Contractor shall, between the first day of January, 2024 and the 31<sup>st</sup> day of December 2026, perform and complete with care, skill, diligence and efficiency the work that is described in the Statement of Work.

#### **6.4.2 Option to Extend the Standing Offer Agreement**

The Contractor grants to Canada the irrevocable option to extend the term of the SOA by up to two (2) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the SOA. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

### **6.5 Authorities**

#### **6.5.1 Contracting Authority**

The Contracting Authority for the Contract is:

*(The Contracting Authority's name will be provided at contract award)*

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:

*(The Project Authority's name will be provided at contract award)*

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

*(Will be completed at contract award)*

## 6.6 Certifications

### 6.6.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Offeror with its offer or precedent to issuance of the Standing Offer (SO), and the ongoing cooperation in providing additional information are conditions of issuance of the SO and failure to comply will constitute the Offeror in default. Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue beyond the period of the SO.

## 6.7 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in *(Will be completed at contract award)*

## 6.8 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, Innovation, Science and Economic Development Canada's General Conditions of a Service Contract;
- c) Annex A, Statement of Work;
- d) Annex B, Terms of Payment;
- e) Annex C, Security Requirements Check List (SRCL); *(if applicable)*
- f) the Contractor's bid dated \_\_\_\_\_ *(To be entered at contract award)*.



### 6.9 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: 2012-2 of the Treasury Board Secretariat of Canada.

### 6.10 Environmental Requirements

In support of the green procurement effort, the Offeror must ensure that:

- a) all printers and photocopiers used for the purposes of this SO are programmed by default to print in black and white on both sides of the paper, and preferably meet ENERGY STAR or equivalent standards regarding energy efficiency.
- b) the paper used contains at least 30% recycled materials and/or is certified as originating from a sustainably managed forest.
- c) environmentally friendly ink or recycled ink cartridges are used in printers, fax machines and photocopiers. It is strongly recommended that the used ink cartridges can be returned to the manufacturer for reuse or recycling.
- d) recycling bins for paper, newsprint and plastic and aluminum containers are available to learners and are emptied regularly, where this service is available, in compliance with the local recycling programs.

In addition, it is preferable that cleaning products used with this equipment be biodegradable and not harmful to the environment.

The federal government reserves the right to conduct inspections by visiting the Offeror's facilities, if necessary, to ensure that efforts in environmental matters are maintained.



## **ANNEX A**

### **Innovation, Science and Economic Development Requirement**

The purpose of this Request for Standing Offer (RFSO) is to establish a Standing Offer Agreement for the Department of Innovation, Science and Economic Development (ISED) for professional services in the areas of: program evaluation, performance measurement and results, and special studies/reviews.

The services will be required commencing from the date of the contract award for an initial period of three years with two possible one year extensions for a total of five years.

#### **1. Project Title:**

Evaluation, Performance Measurement and Special Studies/Review Services for Innovation, Science and Economic Development Canada (ISED)

#### **2. Background:**

In the Government of Canada, evaluation is the systematic collection and analysis of evidence on the outcomes of programs to make judgments about their relevance, performance and alternative ways to deliver them or to achieve the same results.

Evaluation work at Innovation, Science and Economic Development Canada is conducted in accordance with the policies, principles, guidelines, standards and directives on evaluation issued by the Treasury Board of Canada and Treasury Board Secretariat (TBS).

The ISED Audit and Evaluation Branch, Evaluation Directorate, undertakes program evaluation studies, following a five-year Departmental Evaluation Plan. In addition, the Directorate provides advice and guides programs in the development of their Performance Measurement Strategies (PM Strategies) and Performance Information Profiles (PIPs) and their associated elements. From time to time, the Directorate also conducts special studies and/or reviews at the request of senior management.

In addition to in-house resources, the Directorate relies on the expertise provided by outside contractors. The Directorate may contract out complete program evaluations, reviews and performance measurement activities, or any component of these studies (e.g., surveys, literature reviews, case studies, focus groups, cost-benefit analysis).

#### **3. Objective**

The purpose of this Request for Standing Offer (RFSO) is to establish a Standing Offer Agreement for the Department of Innovation, Science and Economic Development (ISED) for professional services in the areas of: program evaluation, performance measurement and results, and special studies/reviews. The services will be required commencing from the date of the contract award for an initial period of three years with two possible one year extensions for a total of five years.

#### **4. Project Requirements**

The requirement is for professional services to provide a range of services related to evaluation, review and performance measurement. These services will be primarily for the Audit and Evaluation Branch of ISED, although other sectors, branches or directorates within ISED may also use the resulting Standing Offer Agreement for the development of PM Strategies, PIPs or other related performance, results, review and evaluation activities.

#### **5. Scope of Work**

5.1 Innovation, Science and Economic Development Canada's evaluation life cycle, in accordance with Treasury Board policies, and guidelines, are comprised of:

- i) An evaluation study or review, conducted as per the Departmental Evaluation Plan or at the request of senior management, which examines evaluation issues as per the TB Policy and Directive on Results, in addition to any other issues requested by program management to assess outcomes.



ii) A Performance Measurement Strategy (PMS), developed at the inception of the program, and revised periodically, which outlines the data collection necessary to assist program managers to monitor the performance of their program and support evaluation;

iii) A Performance Information Profile (PIP), used to describe Programs; to plan for and guide the generation of performance information (measurement and evaluation); and to act as a repository for other key information about a Program and its measurement/results requirements.

5.2 Performance Measurement Strategies include, but are not limited to, the development of a logic model, a performance measurement framework (including data requirements), and an evaluation framework.

5.3 Performance Information Profiles include, but are not limited to, information on the Program's outcomes, outputs and indicators, a summary of evaluation needs for the Program, and a compilation of other key information related to the Program's performance and results. As well, as part of indicator development, assistance in developing data strategies may be required as part of a program's data management system.

5.4 Evaluation products could include evaluability assessments that examine a program's readiness to be evaluated from the perspective of the logical consistency between program components, program maturity, clearly defined outcomes and data availability.

5.5 Contractors may also be requested to undertake specialized studies/reviews, which may be a standalone product, or included as a line of evidence in an evaluation.

5.6 Companies contracted to complete an entire evaluation or review study may be required to include an ISED employee on their team, which would be considered an additional resource, not a substitute. The duties of the officer on the project team will be subject to discussion between ISED and the consulting firm.

5.7 Companies may be required to work with peer review, advisory, or steering committee groups that may include internal and/or external stakeholders.

## **6. Project Details**

### **6.1 Evaluations**

Evaluations are composed of various planning, data collection and analysis components. The contractor may be required to conduct some or all parts of an evaluation project including the following distinct elements:

- (a) Develop an evaluation strategy/framework, or the assessment and revision of an existing framework;
- (b) Assess the evaluability of programs in advance of conducting an evaluation;
- (c) Identify key stakeholder groups;
- (d) Communicate with stakeholders and recipients;
- (e) Assess the quality of available data;
- (f) Design qualitative and/or quantitative data collection methodologies;
- (g) Collect and analyze data based on the data collection methodologies, which could include: interviews (stakeholders, recipients, other levels of government); focus groups; surveys (telephone, web-based, intercept); economic modelling; cost-benefit analysis, statistical analysis, document review; case studies, etc.
- (h) Synthesise and triangulate results from multiple data sources; and,
- (i) Document findings and write reports, which could include technical reports (i.e. the results of the



analysis of a specific line of evidence) and evaluation reports, in their entirety or specific sections.

## **6.2 Special Studies/Reviews**

Specialized studies/reviews may include:

- Program, horizontal or sectoral reviews;
- Large-scale surveys;
- Jurisdictional analysis;
- Best practices assessments;
- Literature reviews of an expanded scope; and,
- Other studies as identified by ISED senior management.

## **6.3 Performance Measurement and Results**

In the development of performance measurement strategies, performance information profiles or program theory, the contractor may be required to conduct all or some of the following activities:

- (a) Develop or revise the program and logic model, performance measurement framework (including outputs, outcomes and indicators linked to data strategies) and evaluation strategy consistent with the Treasury Board of Canada Secretariat guidelines;
- (b) Assess the state of current performance measurement frameworks, and the capacity to create and maintain on-going performance measurement systems at the department, sector, program, initiative or policy level;
- (c) Provide performance measurement advice and support, including providing training or information sessions to assist evaluators or program management with the establishment of an appropriate ongoing performance measurement system;
- (d) Provide data management system support by developing program data strategies which could include data principles, dictionary and inventory, indicators definition, privacy, security and IM/IT elements.
- (e) Assess the implementation of performance measurement strategies and performance information profiles, and the associated data collection methods/data strategies to support and assess program results.

## **7. Contractor Resources Requirements and Qualifications**

### **7.1 Resource Categories**

The following three (3) categories of Contractor personnel may be utilized in the provision of services related to the Standing Offer:



|   |  |
|---|--|
| <b>A. Partner/Principal/Project Director</b>  |  |
| <p><i>Minimum Qualifications:</i></p> <ul style="list-style-type: none"> <li>• Ten (10) years experience in the provision of evaluation, performance measurement, results, and/or other evaluation-related services such as developing evaluability assessments or evaluation plans; and,</li> <li>• Three (3) years experience as a Partner/Principal/Project Director in the provision of Evaluation &amp; Performance Measurement, and/or other evaluation-related services; and,</li> <li>• Completion of an undergraduate degree from a recognized university in a related field (a Graduate Diploma in Public Policy and Program Evaluation will be accepted).</li> </ul> | <p><i>Anticipated Role:</i></p> <ul style="list-style-type: none"> <li>• Exercise project sign-off authority and negotiate final agreements for Call-ups on behalf of the Firm;</li> <li>• Oversee project development, implementation and start-up;</li> <li>• Oversee and approve all project methodologies, reports, data collection instruments, and work plans;</li> <li>• Review final deliverables to ensure reliability and quality of results;</li> <li>• Present or oversee presentation of evaluation findings, results and recommendations to the Project Authority;</li> <li>• Liaise with appropriate authorized Departmental officials when required; and,</li> <li>• Other project management services related to evaluations and other related studies as required.</li> </ul>  |
| <b>B. Senior Consultant/Senior Research Analyst</b>   |  |
| <p><i>Minimum Qualifications:</i></p> <ul style="list-style-type: none"> <li>• Five (5) years experience in the provision of evaluation, performance measurement, results, and/or other evaluation-related services such as developing evaluability assessments or evaluation plans; and,</li> <li>• Two (2) years experience as a Senior Consultant/Senior Research Analyst in the provision of evaluation, performance measurement, and/or other evaluation-related services; and,</li> <li>• Completion of an</li> </ul>   | <p><i>Anticipated Role:</i></p> <ul style="list-style-type: none"> <li>• Develop or participate in the development of project design, approach, strategy and methodology;</li> <li>• Advise on a budget and composition of the project team;</li> <li>• Plan, direct, and supervise the activities of the firm's project teams;</li> <li>• Analyze data and present observations and findings of the completed work to the Project Director, Project Authority, or other authorized individual or group;</li> <li>• Prepare progress reports to the Project Director or Project Authority;</li> <li>• Prepare and review evaluation reports and other appropriate or related deliverables;</li> <li>• Liaise with appropriate authorized Departmental officials when required; and,</li> <li>• Other services related to the provision of</li> </ul> |



|   |  |
|---|--|
| <p>undergraduate degree from a recognized university in a related field, or completion of an undergraduate degree/diploma in a related field (a Graduate Diploma in Public Policy and Program Evaluation will be accepted).</p>   | <p>Evaluation and other related studies as required.</p>   |
| <p><b>C. Junior Consultant/Research Analyst</b></p>   |  |
| <p><i>Minimum Qualifications:</i></p> <ul style="list-style-type: none"> <li>• One (1) year of experience in the provision of evaluation, performance measurement, socio-economic, or science-based research; and,</li> <li>• Completion of an undergraduate degree/diploma in a related field (a Graduate Diploma in Pubic Policy and Program Evaluation will be accepted).</li> </ul> | <p><i>Anticipated Role:</i></p> <ul style="list-style-type: none"> <li>• Conduct or contribute to quantitative and qualitative research and analyses such as literature reviews;</li> <li>• Review and assess relevant program documents and files;</li> <li>• Develop, manage, update and modify databases and spreadsheets;</li> <li>• Analyse research data for preliminary conclusions; and,<br/>Support other members of the project team in various aspects of assigned projects as required.</li> </ul> |

\*\*The above mentioned Anticipated Roles may vary within any resulting Call-up(s).\*\*

**7.2 Provision of Resources within a Call-up**

- 7.2.1 Within a single Call-up, a Contractor will be required to provide one or more qualified resource(s) within the Resource Categories identified above. The number and type of resources required are to be specified.
- 7.2.2 The named resources supplied under any resulting Call-up will meet or exceed the minimum required qualifications for the Resource Category in which the resource is providing services, as specified in 7.1 above.
- 7.2.3 The Contractor will provide the services of the Resource(s) named in the Call-up to perform the work.

**7.3 Subject Matter Experts (SME)**

- 7.3.1 In the event a SME is required, ISED will give details in any resultant call-up TOR, which would include information such as, but not limited to: experience and educational qualifications; expected role of the SME; and cost expectations.
- 7.3.2 Contractors may propose the use of a SME to supplement their own efforts. Contractors shall give Sufficient and compelling reasons as to their need of a SME. This would be subject to approval by the ISED Project Authority.





7.3.3 SMEs will typically be individuals with specialized qualifications (such as a Master's-level or graduate degree) in a specific field or extensive experience in a given subject area, issue or program area.

7.3.4 In the event that SMEs are engaged by the Contractor, the Contractor shall include the costs associated with the SME as part of the firm price of the call-up.

## **8. Language of Work**

Language requirements will be identified in each resulting call up. Contractors shall possess at least one (1) fluently bilingual staff member available for Call-ups in the event there is a need for Services in the Firm's reported secondary Language, or in both Official Languages, such as, for example, interviews, questionnaires, workshops, focus groups, or reports.

## **9. Deliverables: Data and Reports**

### **9.1 Requirements for a Written Report**

All projects, whether complete evaluations, reviews, performance measurement strategies, performance information profiles or individual components, will be required to have a written project report, in a format consistent with the requirements established by ISED.

### **9.2 Economic Models**

Models developed to conduct economic analysis must be shared with ISED, and be available for future ISED use, with appropriate reference to the firm.

### **9.3 Data Transfer to Innovation, Science and Innovation Canada**

Data collected in the course of conducting projects under the Standing Offer Agreement must be stored on servers located in Canada. Innovation, Science and Innovation Canada will determine, on a project by project basis, whether the contractor must transfer the data (micro-data for surveys) collected during the course of the contract, to the Department upon completion of the project.

## **10. Adherence to Treasury Board and PSPC Policies, Standards and Associated Guidance**

When conducting evaluation assignments, contractors must comply with the Treasury Board Policy on Results and related directives, guidelines, standards and guides. They should also comply with any evaluation requirements specified in the Policy on Transfer Payments and related directives, guidelines, standards and guides.

When conducting performance measurement assignments that include an evaluation strategy, contractors must comply with the TBS Guidance on the Development of Performance Measurement Strategies and TB Policy and Directive on Results.

When conducting survey work, contractors must adhere to federal privacy and access to information laws as well as to PSPC Standards for Surveys: <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html> and <http://www.tpsgc-pwgsc.gc.ca/rop-por/enligne-online-eng.html>.

Should the above-noted policies and associated guidance change during the life of the SOA, successful bidders will be notified by ISED and be expected to adhere to those which are current.





## 11. Intellectual Property

Any intellectual property arising from the performance of the Work under the Contract will vest with Canada, on the following grounds: where the main purpose of the Crown Procurement Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

## 12. Security

The proposed personnel of the contractors selected for Standing Offer Agreements will be required to have appropriate security clearances to access to classified or protected material. Specific levels of required security clearance will be determined by ISED on a project-by-project basis.

No pre-existing security clearances are required to submit a proposal; however, such clearances will be a pre-condition to the authorization of any work under any Standing Offer Agreement established as a result of this invitation. Without the appropriate clearance, an alternate contractor will be selected. Innovation, Science and Economic Development Canada may initiate a security screening request if the successful contractor is not security cleared at this level.

## 13. Evaluation Procedures

Proposals will be evaluated in two separate steps as follows:

- a) Evaluation of the Mandatory Requirements as listed in Attachment 1 to Part 4. Only proposals meeting all of the Mandatory Requirements will advance to Step b);
- b) Evaluation of the Point-Rated Requirements as listed in Attachment 2 to Part 4.

**Note:** Innovation, Science and Economic Development Canada may choose to terminate the evaluation of any proposal upon the first findings of non-compliance with a mandatory requirement or upon the first finding where a proposal fails to meet a minimum score for a rated requirement.

An evaluation team composed of representatives of Innovation, Science and Economic Development Canada will evaluate the proposals. The evaluation team reserves the right but is not obliged to perform any of the following:

- a) Seek clarification or verify any or all information provided by the Bidder with respect to this RFP;
- b) Contact any or all of the references supplied and to interview, at the sole costs of the Bidder, the Bidder and/or any or all of the resources proposed by the Bidder to fulfil the requirement, at Innovation, Science and Economic Development Canada in Ottawa, Ontario, on 48 hours notice, to verify and validate any information or data submitted by the Bidder.

## 14. Financial Proposal

The financial proposal is to be submitted as a separate package to the technical proposal.

A full cost breakdown must accompany each proposal. Using the table in **Attachment 1 to Part 3**, the Bidder **MUST** provide fixed per diem rates, by category as per Section 7.0, for any personnel that Bidders propose to utilize (a work day will consist of 7.5 hours.) Rates should be provided for each of the three years of the SOA as well for possible extension years.

**Note:** Failure to provide the per diem rate for the extension year(s) will result in these rates being considered the same as for the third year. Thus, there will not be an opportunity to increase rates.



## 15. Bidder Selection Method

The selection of contractors for standing offer agreements will be based on the following process:

- (a) All mandatory requirements listed in **Attachment 1 to Part 4** have to be met in order for proposals to be further evaluated.
- (b) Proposals that meet all mandatory requirements will then be rated on the point-rated requirements listed in **Attachment 1 to Part 4**.
- (c) The proposals receiving a minimum of 60% on each point-rated requirement, and an overall minimum rating of 70% on all point-rated requirements, will be ranked based on their overall rating of technical (80%) and financial (20%). Out of the successful proposals, up to **eight (8)** of the highest-scoring Bidders may be selected for Standing Offer Agreements.

## 16. Awarding of Standing Offer Agreements

### 16.1 Allocation of Work

Up to (8) Standing Offer Agreements (SOAs) will be authorized for use as a result of this Request for Standing Offers.

Services shall be called up by ISED's Project Authority or an authorized representative, as follows:

For each Work request (Call-up Against a Standing Offer), the Project Authority shall select the Standing Offer Holder (the Offerer) according to:

- i. Appropriateness of the Offerer's project team in terms of qualifications, experience and expertise related to the proposed project.
- ii. Independence of the Offerer - where no "Conflict of Interest" exists (refer section 16.2. below).
- iii. Appropriate Security Clearance level(s) of the Offerer's personnel in relation to the proposed project.
- iv. Availability of the Offerer to perform the Work within the time lines of the proposed project.

Based on the above:

- a) The Project Authority shall provide the selected Offerer with a description of the work to be performed under the Standing Offer in sufficient detail to enable the Offerer to establish a firm or ceiling price for the work.
- b) The selected Offerer shall submit to the Project Authority a brief proposal which will include a work plan, schedule, and personnel with number of days and firm price with supporting details or other method of basis of payment such as ceiling price, depending on the nature of the project.
- c) The firm or ceiling price for the services required will be established by utilizing the applicable firm all inclusive per diem rate(s) as listed in the applicable Standing Offer Agreement and the estimated number of days of effort (if applicable), agreed upon by the Project Authority and the selected Standing Offer Holder(s).
- d) Upon agreement of the firm or ceiling price for the Work requested, the Offerer will be issued a Call-up against their Standing Offer.
- e) The Offerer shall sign and return a copy of the Call-up Against a Standing Offer to the Standing Offer Authority.



**Note:** Time incurred by the Offerer in discussing potential call-ups is not to be a direct charge to the Standing Offer.

### 16.2 Conflict of Interest

In order to provide impartial and objective advice to Canada and to avoid any real or apparent Conflict of Interest, the Offerer represents and warrants that any proposed individual(s) assigned to perform any work under a Call-Up shall not be in a situation of conflict of interest that would render it unable to provide impartial assistance or advice to Canada, or affect or otherwise impair its objectivity in performing the work.

Should an Offerer subsequently become aware of such a potential conflict, it will notify the Project Authority immediately. The Project Authority retains the right to make alternative Call-Up arrangements in such a case.

### 16.3 Maximum Expenditure Limits for Standing Offer Agreements

The following maximum expenditure limits for SOAs issued under this RFSO will be used based on the number of SOAs issued under this RFSO:

It is possible that up to **eight (8)** Bidders may be awarded Standing Offer Agreements. If **eight (8)** Bidders are deemed successful and receive Standing Offer Agreements, then each individual Standing Offer Agreement shall be valued at \$562,500.00 (Canadian Dollars) for the initial three (3) year period, with the one (1) year option periods being valued at \$187,500.00 (Canadian Dollars) each. If less than **eight (8)** Standing Offer Agreements are issued, then the following maximum expenditure limits per SOA over the three (3) year period of the Standing Offer will be in effect:

- Where **seven (7)** SOAs are issued, each SOA will have a potential value of \$642,857.14;
- Where **six (6)** SOAs are issued, each SOA will have a potential value of \$750,000.00;
- Where **five (5)** SOAs are issued, each SOA will have a potential value of \$900,000.00;
- Where **four (4)** SOAs are issued, each SOA will have a potential value of \$1,125,000.00;
- Where **three (3)** SOAs are issued, each SOA will have a potential value of \$1,500,000.00;
- Where **two (2)** SOAs are issued, each SOA will have a potential value of \$2,250,000.00;
- Where **one (1)** SOA is issued, the SOA will have a potential value of \$4,500,000.00

**Note:** all funds are in Canadian dollars and applicable taxes (GST/HST) shall be extra.

#### Call-up Limitation

Individual call-ups against the resulting Standing Offer Agreement must not exceed \$250,000.00 tax included.



## ANNEX B TERMS OF PAYMENT

### 1.0 BASIS OF PAYMENT

His Majesty the King in Right of Canada agrees to pay the Contractor a sum not to exceed *(to be completed at contract award)*, plus applicable taxes, for the work performed as described in the attached Statement of Work (Appendix C).

#### 1.1 Initial Contract Period

During the period of the Contract commencing January 1, 2024 and ending December 31, 2026, the following per diem rates apply for the Initial Contract Period:

##### From January 1, 2024 to December 31, 2026

Partner/Principal/Project Director: *(to be completed at contract award)*

Senior Consultant/Research Analyst: *(to be completed at contract award)*

Junior Consultant/Research Analyst: *(to be completed at contract award)*

\*The Level of Effort and resources names will be determined at time of the Call-up issuance.\*

### 2.0 LIMITATION OF EXPENDITURES

No increase in the total liability of His Majesty or in the price of the Work resulting from any design changes, modifications or interpretations of the specifications, will be authorized or paid to the Contractor unless such design changes, modifications, or interpretations have been approved, in writing, by the Contracting Authority prior to their incorporation into the Work. The Contractor shall not be obliged to perform any work or provide any service that would cause the total liability of His Majesty to be exceeded without the prior written approval of the Contracting Authority.

### 3.0 METHOD OF PAYMENT

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- all such documents have been verified by Canada;
- the Work performed has been accepted by Canada.

### 4.0 CONTRACT

**4.1 Initial Contract Period:** January 1, 2024 and ending December 31, 2026

##### From January 1, 2024 to December 31, 2026

Partner/Principal/Project Director: *(to be completed at contract award)*

Senior Consultant/Research Analyst: *(to be completed at contract award)*

Junior Consultant/Research Analyst: *(to be completed at contract award)*

\*The Level of Effort and resources names will be determined at time of the Call-up issuance.\*



#### 4.2 Option Years:

##### Option Period 1: From January 1, 2027 to December 31, 2027

Partner/Principal/Project Director: *(to be completed at contract award)*

Senior Consultant/Research Analyst: *(to be completed at contract award)*

Junior Consultant/Research Analyst: *(to be completed at contract award)*

\*The Level of Effort and resources names will be determined at time of the Call-up issuance.\*

##### Option Period 2: From January 1, 2028 to December 31, 2028

Partner/Principal/Project Director: *(to be completed at contract award)*

Senior Consultant/Research Analyst: *(to be completed at contract award)*

Junior Consultant/Research Analyst: *(to be completed at contract award)*

\*The Level of Effort and resources names will be determined at time of the Call-up issuance.\*

**Total Estimated Cost:** *(to be completed at contract award)*

**Taxes:** *(to be completed at contract award)*

#### 5.0 AUTHORIZED TRAVEL AND LIVING EXPENSES

Canada will not pay any travel or living expenses associated with performing the Work.

#### 6.0 INVOICING INSTRUCTIONS

The Contractor is required to submit to the address indicated below an invoice for payment. The invoice should include the contract number, the Contractor's name, address, HST number and a description of the work performed including the number of days worked during the period covered by the invoice. The HST shall be submitted as a separate amount on the invoice.

Invoices are to be submitted by email to:

*(to be completed at contract award)*



**ANNEX C - EXPERIENCE PROVIDING EVALUATION, REVIEW AND PERFORMANCE MEASUREMENT SERVICES**

| <b>Part I - Project Details</b>  |  |
|--|--|
| <b>Project Name:</b>   | Provide the name of the project.   |
| <b>Nature of Project:</b>  | Indicate whether the project related to an evaluation, review or performance measurement activities (e.g. Performance Measurement Framework, Performance Information Profile, logic model, data strategy, evaluation framework). |
| <b>Client Organization:</b>  | Indicate the primary client for the project.   |
| <b>Client Contact Name:</b>  | Provide a contact name within the client organization who would be familiar with the project.  |
| <b>Client Contact telephone number:</b>  | Provide the telephone number for the client contact above.   |
| <b>Project Start Date:</b>   | Provide the project start date.  |
| <b>Project End Date:</b>   | Provide the project end date.  |
| <b>Part II – Project Description</b>   |  |
| <p>Provide a description of the work undertaken by your firm as part of this project. The description MUST include:</p> <ul style="list-style-type: none"> <li>• The objectives of the project;</li> <li>• Activities undertaken by the Bidder as part of the project;</li> <li>• A description of the methodologies used and/or approach taken to completing the activities under the project.</li> </ul> |  |



**ANNEX D – ABILITY TO MANAGE COMPLEX PROJECTS**

| <b>Part I - Project Details</b>  |   |
|--|---|
| <b>Project Name:</b>   | Provide the name of the project.  |
| <b>Client Organization:</b>  | Indicate the primary client for the project.  |
| <b>Client Contact Name:</b>  | Provide a contact name within the client organization who would be familiar with the project. |
| <b>Client Contact telephone number and email:</b>  | Provide the telephone number and email for the client contact above.                          |
| <b>Project Start Date:</b>   | Provide the project start date.   |
| <b>Project End Date:</b>   | Provide the project end date.   |
| <b>Part II – Project Description</b>   |   |
| <p>Provide a description of the work undertaken by your firm as part of this project. The description MUST include:</p> <ul style="list-style-type: none"> <li>• The objectives of the project;</li> <li>• Activities undertaken by the Bidder as part of the project;</li> <li>• An description of how the project involved at least one of the following elements:               <ul style="list-style-type: none"> <li>○ Multiple programs or initiatives being evaluated together (e.g. cluster evaluation or a meta-evaluation)</li> <li>○ An evaluation of a program or initiative being delivered by multiple federal organizations with shared outcomes (e.g. horizontal evaluation)</li> <li>○ An evaluation of a program involving multiple stakeholders (e.g. target audiences, agencies, associations) or levels of government (e.g. federal, provincial and territorial, municipal)</li> <li>○ An evaluation of a program having multiple sources of funding where there are issues of attribution in the assessment of program outcomes</li> <li>○ An evaluation of a program with high materiality (greater than \$50M for the period of the evaluation)</li> </ul> </li> </ul> <p><b>Note:</b> Each project submitted must clearly demonstrate a different element listed above.</p> |   |







**ANNEX F - EXPERIENCE CONDUCTING EVALUATIONS IN AREAS OF INTEREST TO INDUSTRY CANADA**

| <b>Part I - Project Details</b>  |   |
|--|---|
| <b>Project Name:</b>   | Provide the name of the project.  |
| <b>Client Organization:</b>  | Indicate the primary client for the project.  |
| <b>Client Contact Name:</b>  | Provide a contact name within the client organization who would be familiar with the project. |
| <b>Client Contact telephone number and email:</b>  | Provide the telephone number and email for the client contact above.                          |
| <b>Project Start Date:</b>   | Provide the project start date.   |
| <b>Project End Date:</b>   | Provide the project end date.   |
| <b>Part II – Project Description</b>   |   |
| <p>Provide a description of the work undertaken by your firm as part of this project. The description MUST include:</p> <ul style="list-style-type: none"> <li>• The objectives of the project;</li> <li>• A description of how the project relates to at least one of the following areas of relevance to Industry Canada: <ul style="list-style-type: none"> <li>○ Transfer Payment Programs (e.g., grants, contributions)</li> <li>○ Non-Transfer Payment Programs, including regulatory, legislative or policy programs and initiatives</li> <li>○ Science, technology and innovation research programs</li> <li>○ Industrial sector development and/or competitiveness</li> <li>○ Commercialization and/or technology adoption</li> <li>○ Business financing and/or loans</li> <li>○ Spectrum management</li> <li>○ Clean technology and clean growth</li> <li>○ Underrepresented entrepreneur programs</li> <li>○ Talent development programs</li> </ul> </li> </ul> <p><b>Note:</b> One project may cover multiple areas of relevance. Areas of relevance that are identified in multiple projects will only be awarded points once.</p> <ul style="list-style-type: none"> <li>• Activities undertaken by the Bidder as part of the project;</li> <li>• A description of the methodologies used and/or approach taken to completing the activities under the project.</li> </ul> |   |



**ANNEX G – PROJECT SUMMARIES**

| <b>Part I - Project Details</b>   |   |
|---|---|
| <b>Project Name:</b>  | Provide the name of the project.  |
| <b>Client Organization:</b>   | Indicate the primary client for the project.  |
| <b>Client Contact Name:</b>   | Provide a contact name within the client organization who would be familiar with the project. |
| <b>Client Contact telephone number:</b>   | Provide the telephone number and email for the client contact above.                          |
| <b>Project Start Date:</b>  | Provide the project start date.   |
| <b>Project End Date:</b>  | Provide the project end date.   |
| <b>Part II – Project Description</b>  |   |
| <p>Provide a description of the work undertaken by your firm as part of this project. The description MUST include:</p> <ul style="list-style-type: none"> <li>• The objectives of the project;</li> <li>• Type of project (evaluation, performance measurement, data management, etc.)</li> <li>• A detailed description of the methodologies employed for the project, including the rationale for why the methodology was selected, and the evaluation questions it addressed.</li> <li>• Methodologies could include:               <ul style="list-style-type: none"> <li>○ Qualitative Methodologies                   <ul style="list-style-type: none"> <li>– Literature Reviews (describe the subject or question being studied)</li> <li>– Document Reviews/file reviews (identify the general type of documents and files reviewed)</li> <li>– Key Interviews (identify key interview groups, and the number of interviews completed for each group)</li> <li>– Case Studies (describe how the case was conducted)</li> <li>– Focus Groups (identify the types of participants)</li> </ul> </li> <li>○ Quantitative Methodologies:                   <ul style="list-style-type: none"> <li>– Cost-Benefit Analysis (indicate the purpose of the analysis and describe the methodology used)</li> <li>– Econometric Analysis (indicate the purpose of the analysis and describe the methodology used)</li> <li>– Statistical Analysis (describe the source of the data and type of analysis completed)</li> <li>– Data Management Strategies (describe the type of program data used and indicators developed)</li> <li>– Surveys (explain the type of survey, population size, data capture and analysis techniques)</li> <li>– Bibliometric/Citation Analysis</li> </ul> </li> </ul> </li> </ul> |   |