



# REQUEST FOR STANDING OFFER (RFSO)

**Subject:**

## PROVISION OF LONG-DISTANCE MOVING SERVICES

For further details, please refer to the Statement of Work attached as **Annexe "A"** of this document.

<b>Issue Date:</b>  January 14, 2021	<b>Closing Date and Time:</b>  February 3, 2021 at 11:00AM EST	<b>RFSO No:</b>  SEN-047 20/21
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### SENATE INFORMATION

<p><b>For all inquiries the Contracting Authority is:</b></p> <p><b>Contact:</b> Shirley Chartrand  <b>Title:</b> Senior Procurement Advisor  <b>Address:</b> 40 Elgin Street, 11<sup>th</sup> floor  Ottawa, ON K1A 0A4, Canada  <b>Telephone no:</b> 613-995-8888  <b>E-mail:</b> <a href="mailto:Proc-appr@sen.parl.gc.ca">Proc-appr@sen.parl.gc.ca</a></p>	<p>Bids can be delivered by <b>e-mail only</b> to the address of the Contracting Authority below.</p> <p><b>E-mail:</b> <a href="mailto:Proc-appr@sen.parl.gc.ca">Proc-appr@sen.parl.gc.ca</a></p> <p><b>PLEASE MARK ALL CORRESPONDANCE WITH THE RFSO NUMBER INDICATED ABOVE.</b></p>
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### BIDDER SIGNATURE BLOCK

The Bidder offers and agrees to provide the Senate of Canada, upon the terms and conditions set out herein, including attachments to this document, the services listed herein and on any attachment at the prices(s) set out, therefore.

The Bidder must have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder must provide, if requested by the Contracting Authority, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. This also applies to Bidders submitting a bid as a joint venture.

Name of Firm:			
Name of Representative:			
Authorized Signature:		Date:	
Position Title:			
Email Address:			
Telephone Number:		Fax Number:	

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## PART 1 - GENERAL INFORMATION

### 1. Introduction

The RFSO is divided into (6) six parts, (7) seven annexes plus (5) five appendixes, as follows:

Part 1	General Information: provides a general description of the requirement
Part 2	Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation
Part 3	Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid
Part 4	Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection
Part 5	Resulting Standing Offer and call-up Clauses: includes the clauses and conditions that will apply to any resulting call-ups, the Annexes, the Appendices, Basis of Payment, and any other annexes
Part 6	Terms of Work and Payment
Annex "A"	Statement of Work
Appendix "1"	Replacement Cost Protection
Appendix "2"	General Rules and Regulations
Appendix "3"	Packing and Wrapping Standards
Appendix "4"	Van/Vehicles/Containers and Equipment
Appendix "5"	Sub Contractor Management
Annex "B"	Basis of Payment - Scenarios
Annex "C"	Basis of Payment – Detailed Price Listing
Annex "D"	Language Proficiency
Annex "E"	Direct Deposit Form
Annex "F"	COVID Form
Annex "G"	Services Evaluation Form

### 2. Summary

The Senate of Canada (Senate) is seeking to establish a Standing Offer Agreement (SOA) for Moving Services, as defined in Annex "A" - Statement of Work, for three (3) years from **April 1, 2021 to March 31, 2024** with an option to extend the SOA for two (2) additional one (1) year terms

### 3. Debriefings

Bidders may request a debriefing on the results of the RFSO process. Bidders should make the request to the Contracting Authority within five (5) working days of receipt of the results of the RFSO process. The debriefing may be in writing, by telephone or in person.

### 4. Bid Submission Language

Submissions will be accepted in either English or French.

### 5. Key Terms and Definitions

Terms	Definitions
Account Manager	an employee of the Contractor and who manages the relationship between the Senate and the Contractor. Does not manage the running of the project
Bidder	the person or entity submitting a bid to perform the services outlined in Annex "A" – Statement of Work. It does not include the parent, subsidiaries or other affiliates of the Bidder, or its subcontractors.
Contracting Authority	means the person designated in this RFSO and any resulting call-up, or by notice to the Bidder, to act as the representative of the Senate of any resulting call-up.
Day	means working day unless otherwise specified
NCR	National Capital Region
Project Manager	An employee of the Contractor who supervises the work of the Contractor's employees. This individual manages the running of the project on behalf of the Contractor.
Senate	the Senate of Canada
SOW	the whole of the goods/services, materials, matters and things required to be done, furnished and performed in order to carry out the standing offer agreement and resulting contracts including all services to be delivered.
RFSO	Request for Standing Offer Agreement
Responsive Bid	a bid that complies with the invitation to bid and all prescribed
Work	as per defined in the SOW
Office of the Senator (Client).	The Senator's office staff
PMV	Private Motor Vehicle
HG&E	Household Goods and Equipment

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## PART 2 - BIDDER INSTRUCTIONS

### 1. Prelude

- 1.1 The Senate invites “Bidders” to respond to this RFSO to provide moving services as described in Annex “A” – Statement of Work (SOW).

### 2. Signature Requirement

- 2.1 Page 1 of this RFSO must be completed, signed, dated and returned with your mandatory requirements bid thereby acknowledging having read, understood and accepted the complete bid package and all addendums issued.
- 2.2 The Chief Executive Officer or a designate that has been authorized to commit the Bidder to contracts must sign the RFSO.
- 2.3 Failure to sign the cover page shall result in the disqualification of the bid.

### 3. Irrevocable Bids

- 3.1 Bids will remain open for acceptance for a period of not less than **ninety (90) days** from the closing date of the bid solicitation, unless specified otherwise in the bid solicitation.
- 3.2 The Senate reserves the right to seek an extension of the bid validity period from all responsive Bidders in writing, within a minimum of **five (5) days** before the end of the bid validity period. If the extension is accepted by all responsive Bidders, the Senate will continue with the evaluation of the bids. If the extension is not accepted by all responsive Bidders, the Senate will, at its sole discretion, either continue with the evaluation of the bids of those who have accepted the extension or cancel the solicitation.

### 4. Cost Related to the Preparation of Bid

- 4.1 No payment direct or indirect will be made for costs that may be incurred relative to the preparation or submission of a bid in response to this RFSO. All electronic documents shall become the property of the Senate and will not be returned.

### 5. Joint Venture

- 5.1 A joint venture is an association of two or more parties who combine their money, property, knowledge, expertise or other resources in a single joint business enterprise, sometimes referred as a consortium, to bid together on a requirement. Bidders who bid as a joint venture must indicate clearly that it is a joint venture and provide the following information:
  - a. the name of each member of the joint venture;
  - b. the Procurement Business Number of each member of the joint venture;
  - c. the name of the representative of the joint venture, i.e. the member chosen by the other members to act on their behalf, if applicable; and
  - d. the name of the joint venture, if applicable.
- 5.2 If the information is not clearly provided in the bid, the Bidder must provide the information on request from the Contracting Authority.
- 5.3 The bid and any resulting SOA must be signed by all the members of the joint venture unless one member has been appointed to act on behalf of 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 RFSO and any resulting SOA. If a SOA is awarded to a joint venture, all members of the joint venture will be jointly and severally or liable for the performance of any resulting SOA.

### 6. Inquiries and Communications

- 6.1 The Contracting Authority for all inquiries and other communications in regard to this RFSO is stated on the cover page of this document. All communication or inquiries must

be directed **ONLY** to this person. Non-compliance with this condition for that reason alone will result in the disqualification of Bidder's bid.

- 6.2 Enquiries regarding this RFSO must be received by e-mail at: [Proc-appr@sen.parl.gc.ca](mailto:Proc-appr@sen.parl.gc.ca) by the Contracting Authority, no later than **January 25, 2021 by 11am EST**. Enquiries received after that time may not be answered. Bidders should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable the Senate to provide an accurate answer. Enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where the Senate determines that the enquiry is not of a proprietary nature. The Senate may edit the question(s) or may request that the Bidder do so, in order that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by the Senate.
- 6.3 To ensure the equality of information among Bidder, answers to enquiries which are relevant to the RFSO will be provided to all Bidders by simultaneously posting responses to Buy and Sell without revealing the sources of the inquiry.

## 7. Provision of False or Incorrect Information

- 7.1 The Senate will reject any bids found to contain false, incorrect or misleading information. It is the responsibility of the Bidder to ensure that all information provided is accurate, clear and easily understood. Furthermore, the Senate may refer cases of fraudulent misrepresentation to the Royal Canadian Mounted Police for potential criminal investigation.

## 8. Price Justification

- 8.1 If there is a sole responsive bid received, the Bidder must provide, on the Senate's request, one or more of the following price justifications:
- a current published price list indicating the percentage discount available to the Senate; or
  - a copy of paid invoices for similar goods and services provided to other clients; or
  - a price breakdown showing the cost of direct labor and profit; or
  - price or rate certifications; or
  - any other supporting documentation as requested by the Senate.

## 9. Conflict of Interest – Unfair Advantage

- 9.1 In order to protect the integrity of the procurement process, Bidders are advised that the Senate may reject a bid in the following circumstances:
- if the Bidder, any of its affiliates or subcontractors any of their respective employees or former employees was involved in any manner in the preparation of the RFSO or in any situation of conflict of interest or appearance of conflict of interest;
  - if the Bidder, any of its affiliates or subcontractors, any of their respective employees or former employees had access to information related to the RFSO that was not available to other Bidders and that would, in the Senate's opinion, give or appear to give the Bidder an unfair advantage.
- 9.2 The experience acquired by a Bidder who is providing or has provided the goods and services described in the RFSO (or similar goods and services) will not, in itself, be considered by the Senate as conferring an unfair advantage or creating a conflict of interest. This Bidder remains however subject to the criteria established above.
- 9.3 Where the Senate intends to reject a bid under this section, the Contracting Authority will inform the Bidder and provide them with 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 the Senate's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

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## 10. Ownership of RFSO documents

- 10.1 This RFSO and all supporting documentation have been prepared by the Senate and remain the sole property of the Senate, Ottawa, Canada. The information is provided to the Bidder solely for its use in connection with the preparation of a response to this RFSO and shall be considered to be proprietary and confidential information of the Senate. These documents are not to be reproduced, copied, loaned or otherwise disclosed directly or indirectly, to any third party except those of its employees having a need to know for the preparation of the Bidders response, and the Bidder further agrees not to use them for any purpose other than that for which they are specifically furnished.

## 11. Funding Approvals

- 11.1 Bidders should note that all contract awards are subject to the Senate's internal approvals process which includes the requirement of obtaining internal approvals should funding requirements exceed internal budgets for any proposed contract. Despite the fact that a Bidder may have been recommended for SOA award, a SOA will only be awarded if internal approval is granted according to the Senate's internal policies. In this case, if approval is not granted, a SOA cannot be awarded.

## 12. Applicable Laws

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

## 13. Level of Security

- 13.1 In accordance with the Senate Accreditation Policy a valid security clearance is a condition of any Senate contract and is required for all individuals with whom the Senate may need to share or provide access to sensitive or classified information, assets, or facilities.
- 13.2 Before any work can be undertaken at/with the Senate, all individuals, including affiliates and subcontractors working on any resulting contract(s) must hold a valid security clearance at the level of "Site Access" by a parliamentary or governmental institution recognized by the Senate.
- 13.3 Individuals that do not hold a valid security clearance at the level of "Site Access" by a recognized institution must undergo the Senate security screening process and successfully obtain a Senate security clearance at the required level.
- 13.4 A financial inquiry may be performed as part of the security screening process to assess whether an individual poses a security risk on the basis of financial pressure or history of poor financial responsibility. The inclusion of a financial inquiry in a security screening is determined on a case-by-case basis and is based on the types of duties or tasks being performed by the individual at the Senate.
- 13.5 The Senate reserves the right to raise the required level of a security clearance as needed.



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## PART 3 – BID PREPARATION INSTRUCTIONS

### 1. Bid Preparation Instructions

The Senate requests that Bidders provide their bid in four (4) separate electronic files in a single transmission as follows:

File I: Mandatory Criteria (one soft copy in PDF format) and Page 1 of the RFSO signed

File II: Technical Bid (one soft copy in PDF format)

File III: Financial Bid – Annex “B” – Basis of Payment – Scenarios (one soft copy in PDF format)  
Financial Bid – Annex “C” – Basis of Payment – Detailed Price Listing (one soft copy in PDF format)

File IV: Annex “E” - Direct Deposit Form (one soft copy in PDF format)

The Senate 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.

Bidders must indicate the RFSO number as part of the subject line in their electronic bid submission.

Prices must appear in the financial bid only. **Prices indicated in any other section of the bid will result in the disqualification of the bid.**

For bids transmitted by email, the Senate will not be responsible for any failure attributable to the transmission or receipt of the email bid. The Senate will send a confirmation email to the Bidders when the submission is received.

#### File I: Mandatory Criteria

1. In the Mandatory Criteria Section of their bid, Bidders should clearly indicate how they meet each of the Mandatory Criteria outlined in Part 4 – Evaluation Procedures and Basis of Selection.

#### File II: Technical Bid

1. In their Technical Bid, Bidders should demonstrate their understanding of the requirements contained in the RFSO and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.
2. 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 RFSO is not sufficient. In order to facilitate the evaluation of the bid, the Senate requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

#### File III: Financial Bid - Annex “B” – Basis of Payment – Scenarios Financial Bid - Annex “C” – Basis of Payment – Detailed Price Listing

1. Pricing must include all requirements as set forth in the RFSO.
2. Bidders must submit their Financial Bid, in Canadian funds, in accordance with the Annex “B” - Basis of Payment – Scenarios and Annex “C” – Basis of Payment – Detailed Price Listing.
3. Failure to complete and return this information shall result in the disqualification of your bid.

#### File IV: Annex “E” – Direct Deposit Form

1. Bidders must complete, sign and return Annex “E” – Direct Deposit Form with their Bid.

## PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

- 1.1 Bids will be assessed in accordance with the entire requirement of the RFSO including the mandatory criteria, technical criteria and financial bid.
- 1.2 The Senate shall conduct the RFSO process in a fair manner and will treat all Bidder's equitably. Objective standards and evaluation criteria will be applied uniformly to all Bidders.
- 1.3 An evaluation team composed of representatives of the Senate will evaluate the bids.
- 1.4 It is the responsibility of the Bidder to ensure that their bid is clear and complete. The Senate reserves the right to contact any Bidder during the evaluation of bids to obtain clarifications. If the Senate seeks clarification or verification from the Bidder about its bid, the Bidder will have **two (2) working days** (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to the Senate. Failure to meet this deadline will result in the bid being evaluated on the information that was provided.

### 2. Mandatory Criteria

- 2.1 Bidders must ensure full compliance with the following mandatory requirements. Failure to clearly demonstrate full compliance or provide supporting documentation will result in the disqualification of the bid.
- 2.2 The Bidder must include the Mandatory Criteria table in their bid and ensure that the page and paragraph number in the Bidders' Bid is indicated in the column entitled "Cross Reference" for all mandatory information included.
- 2.3 Bidders **MUST meet all the mandatory requirements** of the RFSO. No further consideration will be given to Bidders not meeting all the mandatory criteria.

The mandatory criteria are:

<b>MANDATORY CRITERIA TABLE</b>			
<b>Mandatory Criteria</b>	<b>Submission Requirements</b>	<b>Met / Not Met</b>	<b>Cross Reference</b>
<p><b>M1. Bidder's Years of Experience</b></p> <p>The Bidder must have a minimum of five (5) years of experience in the last seven (7) providing moving services, similar in scope and complexity as the work described in Annex "A" - Statement of Work.</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>• A statement indicating that they can provide these services throughout all of Canada.</li> </ul> <p>All information requested must be provided under Mandatory Criterion (M1) in your submission.</p> <p>Failure to provide the information specified will result in your bid being given no further consideration.</p>		
<p><b>M2. Bilingual Account Manager</b></p> <p>The Bidder must designate a bilingual account manager who will act as the principal point of contact for all matters related to these requested services.</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide the following:</p> <ul style="list-style-type: none"> <li>• account manager's full name</li> <li>• a statement indicating that he/she meets the language requirement.</li> </ul>		

<b>MANDATORY CRITERIA TABLE</b>			
<b>Mandatory Criteria</b>	<b>Submission Requirements</b>	<b>Met / Not Met</b>	<b>Cross Reference</b>
<p>The account manager must meet the language proficiency level intermediate as described in Annex “D” - Language Proficiency.</p>	<p>All information requested must be provided under Mandatory Criterion (M2) in your submission.</p> <p>Failure to provide the information specified will result in your bid being given no further consideration.</p>		
<p><b>M3. Bidder’s References</b></p> <p>The Bidder must provide references for two (2) accounts where the Bidder’s firm was awarded contracts involving inter-provincial long haul move services. These accounts must be of similar size and complexity to the requirements of the statement of work and must have been completed within the past five (5) years.</p> <p><b>NOTE:</b> The Senate may not be used as a reference.</p> <p>The Senate of Canada <u>may</u> contact these references to validate the information provided</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide the following details for each reference:</p> <ul style="list-style-type: none"> <li>• Name of company</li> <li>• Contact Name</li> <li>• Valid phone number and/or e-mail address for the contact.</li> <li>• Length of time providing services to the client.</li> <li>• A brief description of the services provided</li> </ul> <p>This information must be provided under Mandatory Criterion (M3) in your submission.</p> <p>Failure to provide this information will result in your bid being given no further consideration.</p>		
<p><b>M4. Region of Service</b></p> <p>The Bidder must have the capability to provide services throughout all of Canada, from coast to coast (Eastern provinces, Central provinces, Western provinces and Nunavut.)</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>• A statement indicating that they can provide these services throughout all of Canada.</li> </ul> <p>All information requested must be provided under Mandatory Criterion (M4) in your submission.</p> <p>Failure to provide the information specified will result in your bid being given no further consideration.</p>		
<p><b>M5. Market Rating</b></p> <p>The Bidder must be a member, in good standing, of the Better Business Bureau (BBB). (minimum A rating).</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>• a statement that they meet this mandatory requirement</li> </ul> <p>The Senate of Canada reserves the right to validate this rating on the BBB website.</p> <p>All information requested must be provided under Mandatory Criterion (M5) in your submission.</p>		

MANDATORY CRITERIA TABLE			
Mandatory Criteria	Submission Requirements	Met / Not Met	Cross Reference
	Failure to provide the information specified will result in your bid being given no further consideration		
<p><b>M6. Insurance</b></p> <p>The Bidder must provide a certificate or letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a SOA, can provide replacement cost protection in accordance with the Replacement Cost Protection Requirements specified at Appendix “1”.</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>Letter from an insurance broker or an insurance company indicating that the Bidder can meet or exceed the insurance requirement outlined in Appendix “1”. This letter must be on the Insurance Company of Insurance Broker’s letterhead.</li> <li>The letter should indicate the type of coverage they have, the term of the insurance and that insurance company/broker shall notify the Senate should the insurance not be renewed.</li> </ul> <p>All information requested must be provided under Mandatory Criterion (M6) in your submission.</p> <p>Failure to provide the information specified will result in your bid being given no further consideration</p>		
<p><b>M7. Data stored in Canada</b></p> <p>The Bidder must confirm in writing that all data pertaining to the Senate must be stored in Canada.</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>a statement indicating compliancy with the mandatory requirement.</li> </ul> <p>This information must be provided under Mandatory Criterion (M7) in your submission.</p> <p>Failure to provide the information specified will result in your bid being given no further consideration.</p>		
<p><b>M8. Data Breach Notification</b></p> <p>The Bidder must provide assurances that any data breach affecting the Senate data will be communicated to the Senate as soon as the Bidder becomes aware of the breach.</p>	<p>In order to meet this Mandatory requirement, the Bidder must provide:</p> <ul style="list-style-type: none"> <li>a statement indicating compliancy with the mandatory requirement.</li> </ul> <p>This information must be provided under Mandatory Criterion (M8) in your submission.</p>		

MANDATORY CRITERIA TABLE			
Mandatory Criteria	Submission Requirements	Met / Not Met	Cross Reference
	Failure to provide the information specified will result in your bid being given no further consideration.		
<b>M9. Reporting</b>  The Bidder must provide various reports to the Senate Project Authority as indicated in the Annex “A” - Statement of Work, 7.3 – Reporting.	In order to meet this Mandatory requirement, the Bidder must provide: <ul style="list-style-type: none"> <li>a statement indicating compliancy with the mandatory requirement.</li> </ul> This information must be provided under Mandatory Criterion (M9) in your submission.  Failure to provide the information specified will result in your bid being given no further consideration.		
<b>M10. Acceptance of resulting contract clauses</b>  The Bidder must confirm that, should they be the successful Bidder, they acknowledge acceptance of the resulting contract clauses outlined in Part 5 – Standing Offer and Resulting Call-up Clauses	In order to meet this Mandatory requirement, the Bidder must provide <ul style="list-style-type: none"> <li>a statement indicating compliancy with the mandatory requirement.</li> </ul> This information must be provided under Mandatory Criterion (M10) in your submission.  Failure to provide the information specified will result in your bid being given no further consideration.		

### 3. Rated Evaluation Criteria

- 3.1 Bids that do not clearly meet all the mandatory criteria set forth in this RFSO and do not attain a minimum of **56 points** for the requirements which are subject to the evaluation criteria point rating will receive no further consideration.
- 3.2 Price is only one criterion in the evaluation of bids. The Senate is seeking best overall value and will evaluate bids on a point rating system based on evaluation criteria.
- 3.3 The Bidder must include the Point Rated Technical Criterion table in their bid and ensure that the page and paragraph number in the Bidders’ Appendix is indicated in the column entitled “Cross Reference” for all rated information included.
- 3.4 Bidders must include all information relating to the criteria in the Bidder’s Technical Bid. All information contained within the Bidder’s Technical Bid must be complete and clear in order to be evaluated. Failure to include all information may result in disqualification of the bid.

The rated evaluation criteria are:

<b>TECHNICAL EVALUATION CRITERIA</b>		
<b>TECHNICAL MERIT Point Rated Technical Criterion</b>	<b>Maximum No. of Points Available</b>	<b>Cross Reference Section</b>
<p><b>R1. Bidder Experience</b></p> <p>Bidder's experience in providing bilingual services in the provision of moving services</p> <p>The Bidder shall demonstrate experience which is above and beyond the minimum five (5) years of experience identified in M1.</p>	<p style="text-align: center;"><b>Maximum 10 points</b></p> <p><b>6 points</b> - 5 + to 10 years  <b>8 points</b> - 10+ to 15 years  <b>10 points</b> - 15+ years</p>	
<p><b>R2. Bidder Reference</b></p> <p>The Bidder shall provide references for two (2) accounts where the Bidder's firm was awarded contracts involving inter-provincial long-haul moving services. These accounts must be of similar size and complexity to the requirements of the statement of work and must have been completed within the past five (5) years.</p> <p>The Senate of Canada <u>may</u> contact these references to validate the information provided.</p> <p><b>NOTE:</b> The Senate may not be used as a reference.</p>	<p style="text-align: center;"><b>Maximum 30 points</b></p> <p><b><u>Each reference submitted shall be rated on 15 points</u></b></p> <p><b>1-5 points:</b> The Reference provided validates a minimal similarity to the work requested in the Annex "A" – Statement of Work.</p> <p><b>6-10 points:</b> The Reference provided demonstrates a similarity to the work requested in Annex "A" – Statement of Work but not in all aspects.</p> <p><b>11-15 points:</b> The Reference provided validates a full similarity to the work requested in the Annex "A" – Statement of Work.</p>	
<p><b>R3. Subcontractor Management Plan</b></p> <p>The Bidder shall submit a Subcontractor Management Plan that identifies the working relationships between the Bidder and the subcontractors that will provide services under the resulting SOA, as per Appendix "5" - Subcontractor Management Plan</p> <p>The Subcontractor Management Plan must address each of the following items:</p> <ul style="list-style-type: none"> <li>• The Bidder's methodology used to select and vet subcontractors;</li> <li>• The Bidder's overall methodology used to manage its subcontractors and their deliverables; and</li> <li>• How the Bidder will manage a notification from the Senate that services provided by subcontractors have failed to meet performance measures as established in the SOA.</li> </ul>	<p style="text-align: center;"><b>Maximum 15 points</b></p> <p><b>1-5 points:</b> The Reference provided validates a minimal similarity to the work requested in the Annex "A" – Statement of Work.</p> <p><b>6-10 points:</b> The Reference provided demonstrates a similarity to the work requested in Annex "A" – Statement of Work but not in all aspects.</p> <p><b>11-15 points:</b> The Reference provided validates a full similarity to the work requested in the Annex "A" – Statement of Work.</p>	

<b>TECHNICAL EVALUATION CRITERIA</b>		
<b>TECHNICAL MERIT Point Rated Technical Criterion</b>	<b>Maximum No. of Points Available</b>	<b>Cross Reference Section</b>
<b>R4 Reporting</b>  The Bidder shall provide sample reports showing at a minimum the required information identified in Annex “A” - Statement of Work – 7.3 - Reporting.	<b>Maximum 15 points</b>  <b>1-5 points:</b> The Bidder can provide some of the required reports.  <b>6-10 points:</b> The Bidder can provide some of the required reports and can customize reports for the Senate.  <b>11-15 points:</b> The Bidder can provide all required reports and can customize reports for the Senate.	
<b>R5. Green Business Practices</b>  The Bidder shall outline their company’s sound environmental practices.	<b>Maximum 5 points</b>  <b>0 point:</b> The Bidder does not demonstrate green business practices.  <b>5 points:</b> The Bidder demonstrate green business practices.	
<b>R6. Accessibility</b>  The Bidder shall outline their company’s accessibility practices  “Accessibility refers to the design of products, devices, services, or environments as to be usable by people with disabilities.”	<b>Maximum 5 points</b>  <b>0 point:</b> The Bidder does not demonstrate accessibility practice.  <b>5 points:</b> The Bidder demonstrate accessibility practice.	
<b>Total of all the point rated technical criteria</b>	<b>80 points Maximum</b>	
<b>Minimum pass mark</b>	<b>56 points required to pass</b>	

#### 4. Financial Evaluation

- 4.1 The price of the offer will be evaluated in Canadian dollars, tax excluded.
- 4.2 For offer evaluation and Offeror selection purposes only, the evaluated price of an offer will be determined in accordance with the Financial Offer detailed in Annex “B” – Basis of Payment – Scenarios.

#### 5 Basis of Selection

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

A bid must comply with all the requirements of the RFSO. If it is determined that a bid does not comply with any of the requirements of the RFSO, such bid will be deemed non-responsive and will not be given further consideration.



The evaluation and selection process will be conducted in the following phases:

- Phase 1 – Mandatory Criteria
- Phase 2 – Technical Merit - Rated Evaluation
- Phase 3 – Determination of Highest Ranked Bidder

Phase 1 – Mandatory Criteria

In Phase 1, all bids will be evaluated for their compliance with the mandatory criteria. Any bid that fails to meet any of the mandatory criteria will be deemed non-responsive and will not be given further consideration.

Phase 2 – Technical Merit - Rated Evaluation

In Phase 2, the bids that are deemed responsive in Phase 1 will be evaluated against the rated technical criteria. If any Phase 2 bid does not obtain the required minimum overall points for the technical evaluation criteria, such bid will not be given further consideration.

Phase 3 – Determination of Highest Ranked Bidder

In Phase 3, a combined evaluation score for those bids deemed responsive in Phases 1 and 2 will be determined in accordance with the following formula:

For evaluation purposes, the total of Annex “B” – Basis of Payment – Scenarios shall be used.

$$\frac{\text{Technical Proposal Score} \times 70}{\text{Maximum Number of Points}} + \frac{\text{Lowest Price} \times 30}{\text{Bidder's Price}} = \text{Combined Evaluation Score}$$

The Bidder with the highest combined evaluation score will be considered for the award of a SOA.

In the case of a tie bid, when all factors including pricing are considered equal, a coin toss shall be used to determine which of the tied Bidders receive the award.

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## **PART 5 – STANDING OFFER AND RESULTING CALL-UP CLAUSES**

The following clauses and conditions shall apply to and form part of any SOA and call-ups resulting from the RFSO.

### **1. Appropriate Law**

- 1.1 This SOA shall be governed by and construed in accordance with the laws in force in the province of **Ontario**.

### **2. Assignment**

- 2.1 The SOA shall not be assigned in whole or in part by the Contractor without the prior written consent of the Senate and any assignment made without that consent is void and of no effect.
- 2.2 No assignment of the SOA shall relieve the Contractor from obligations under the SOA or impose any liability upon the Senate.

### **3. Time is of the Essence**

- 3.1 Time is of the essence in this SOA.
- 3.2 Any delay by the Contractor in performing the Contractor's obligations under the SOA and any resulting call-up which is caused by events beyond the Contractor's control must be reported in writing to the Senate. This notice shall state the cause and circumstances of the delay. Furthermore, when requested to do so, the Contractor shall deliver, in a form satisfactory to the Senate, a "work around plan" including alternative sources and any other means that the Contractor will utilize to overcome the delay.
- 3.3 Unless the Contractor complies with the notice requirements set forth in the SOA, any delays that would constitute an excusable delay shall be deemed not to be an excusable delay.
- 3.4 Notwithstanding that the Contractor has complied with the notice requirements, the Senate may exercise any right of termination contained in the SOA.

### **4. Indemnity against Claims**

- 4.1 Except as otherwise provided in the SOA, the Contractor shall indemnify and save harmless the Senate from and against any and all claims, damages, loss, costs and expenses which they may at any time incur or suffer as a result or arising out of:
- a. any injury to persons (including injuries resulting in death) or loss of or damage to property of others which may be alleged to be caused by or suffered as a result of the carrying out of work or any part thereof; and
  - b. any liens, attachments, charges or other encumbrances or claims upon or in respect of any materials, parts, work in progress or finished work delivered to or in respect of which any payments have been made by the Senate.

### **5. Insurance**

- 5.1 The Contractor shall carry insurance coverage that is necessary to fulfill its obligation under the SOA and any resulting call-up and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the SOA.
- 5.2 The Contractor shall carry replacement cost coverage on all items being moved.
- 5.3 The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the SOA, a Certificate of Insurance or letter from the insurance company evidencing that insurance coverage and replacement cost coverage is in force.

- 5.4 The insurance policy shall have a 30-day notification clause whereby the Senate shall be notified should this insurance policy be cancelled or terminated.

## 6. Inspection and Acceptance

- 6.1 All reports, deliverables, items, documents, goods and all services rendered under the SOA and resulting call-ups are subject to inspection by the Project Authority or his/her representative. Should any report, document, good or services not be in accordance with the requirement of the Statement of Work and to the satisfaction of the Project Authority or his/her representative, as submitted, the Project Authority will have the right to reject it or require the correction at the sole expense of the Contractor before recommending payment. The Senate reserves the right of access to any records resulting from this SOA and any resulting call-up.

## 7. Termination of Standing Offer Agreement (SOA)

- 7.1 The Senate may immediately terminate this SOA if the Contractor is for any reason unable to provide the services required under this SOA and any resulting call-up. Such termination notice shall be made in writing.
- 7.2 The SOA and any resulting call-up may be immediately terminated by the Senate if it is determined that the services provided by the Contractor are not satisfactory. Such termination notice shall be made in writing.
- 7.3 The SOA and any resulting call-up may be terminated by the Senate upon **ten (10) days** written notice if it is determined that the work, services or goods provided by the Contractor, either in whole or in part, are no longer required.
- 7.4 Either party may terminate this SOA upon ten (10) days written notice.

## 8. Notice

- 8.1 Any notice or other communication may be given in any manner, and if required to be in writing, shall be addressed to the party to whom it is intended at the address in the SOA or at the last address of which the sender has received written notice.
- 8.2 Any notice or other communication given in writing in accordance with paragraph 8.1 shall be deemed to have been received by either party:
- If delivered personally, on the day that it was delivered
  - If forwarded by mail, on the earlier of the day it was received or the sixth day after it was mailed
  - If forwarded by facsimile or electronic mail, 24 hours after it was transmitted.
- 8.3 A notice given under Termination of Standing Offer Agreement shall be given in writing and, if delivered personally, shall be delivered, if the Contractor is a sole proprietor, to the Contractor

## 9. Warranties

The Contractor warrants that:

- 9.1 it is competent to perform the Work required under this SOA and the Contractor has the necessary qualifications, including the knowledge, skill and ability to perform the Work effectively;
- 9.2 it shall provide under this SOA a quality of service at least equal to that which Contractors generally would expect of a competent Contractor in a like situation;
- 9.3 it has complete authority to enter into this SOA; and
- 9.4 all work commenced under this SOA will be completed in full.

## 10. Records to be kept by the Contractor

- 10.1 The Contractor shall keep proper accounts and records of the costs of work, services, and all expenditures or commitments made by the Contractor including the invoices,

receipts and vouchers. These accounts and records shall at reasonable times be open to audit and inspection by the authorized representatives of the Senate, who may make copies and take extracts therefrom.

- 10.2 The Contractor shall not dispose of the documents referred to herein without the written consent of the Senate, but shall preserve and keep them available for audit and inspection for such period of time as may be specified elsewhere in the SOA or, in the absence of such specification, for a period of two (2) years following the completion of the work.

## 11. Confidentiality

- 11.1 Any information of a character confidential to the affairs of the Senate, its members or any of its employees, agents or Contractors to which the Contractor or any of its employees, or affiliates or subcontractors become privy as a result of services to be performed under this SOA and any resulting call-up shall be treated as confidential during and after the performance of the work.

## 12. Safeguarding of Senate information

- 12.1 It is a **MANDATORY REQUIREMENT** of this SOA and any resulting call-up that the Contractor insure or guarantee that all information provided under this SOA or resulting call-up be kept in Canada. If at anytime throughout the term of any resulting call-up, the storage location of all information is no longer kept in Canada, the Contractor shall notify the Senate Contracting Authority immediately in accordance with Section 8- Notice of this SOA.

## 13. Rules and Regulations

- 13.1 In its operation, the Contractor and its employees will comply and abide by all lawful rules and regulations of the Senate which may be established from time to time, provided that no such rules or regulations shall inhibit the Contractor from exercising its rights and duties hereunder.
- 13.2 The Contractor further understands that, to ensure fairness, openness and transparency in the procurement process, the commission of certain acts or offenses may result in a termination for default under the SOA. If the Contractor made a false declaration in its bid, makes a false declaration under the SOA, fails to diligently maintain up-to-date the information herein requested, or if the Contractor or any of the Contractor's affiliates or subcontractors fail to remain free and clear of any acts or convictions specified herein during the period of the SOA, such false declaration or failure to comply may result in a termination for default under the SOA. The Contractor understands that a termination for default will not restrict the Senate's right to exercise any other remedies that may be available against the Contractor and agrees to immediately return any advance payments.

## 14. Miscellaneous Restrictions

- 14.1 Under no circumstances shall the Contractor use any stationery with Senate letterhead to conduct business under this SOA.
- 14.2 It is the intention of the parties that the contract is for the performance of a service or services and that the Contractor is engaged as an independent Contractor providing services to the Senate and that the Contractor's Directors, Officers, Employees are not engaged as Senate employees and they are not subject to the terms and conditions of employment or privileges applicable to the employees of the Senate.
- 14.3 No Contractor or their staff can render services or benefit from payments under a SOA with the Senate if they are a family member (as defined in the Senate Administrative Rules) of the end user or of someone in a similar position who has influence over the scope of work.

## 15. Subcontracts

- 15.1 The Contractor must obtain the Contracting Authority's written consent before subcontracting or permitting the subcontracting of any part of the work. A subcontract

includes a contract entered into by any subcontractor at any tier to perform any part of the Work.

15.2 In any subcontract, the Contractor must, unless the Contracting Authority agrees in writing, ensure that the subcontractor is bound by conditions compatible with and, in the opinion of the Contracting Authority, not less favourable to the Senate than the conditions of the SOA.

15.3 Even if the Senate consents to a subcontract, the Contractor is responsible for performing the call-up and the Senate is not responsible to any subcontractor. The Contractor is responsible for any matters or things done or provided by any subcontractor under the call-up and for paying any subcontractors for any part of the Work they perform.

## **16. No Implied Obligations**

16.1 It is the intention of the parties that this SOA is for the provision of services. The Contractor is engaged as an independent Contractor providing services in accordance with this SOA, to the Senate. The Contractor's directors, officers, employees and agents are not engaged as Senate employees and are not subject to the terms and conditions of employment applicable to the employees of the Senate.

## **17. Performance**

17.1 The Contractor shall report the performance under this SOA and any resulting call-up to the Senate in whatever format and frequency that the Senate may require.

## **18. Amendments to the Standing Offer Agreement (SOA)**

18.1 No person other than the Manager of Procurement Services or their designate can amend this SOA in any form. Any changes to the original SOA must be made in writing.

## **19. Conflict of Interest**

19.1 The Contractor declares that the Contractor has no pecuniary interest in the business of any third party that would cause a conflict of interest or seem to cause a conflict of interest in carrying out the work. Should such an interest be acquired during the life of the SOA, the Contractor shall declare it immediately to the Senate.

19.2 It is a term of this SOA or any resulting call-up that no former public office holder who is not in compliance with the Conflict of Interest Act shall derive a direct benefit from this SOA or any resulting call-up.

## **20. Discrimination and Harassment in the Workplace**

20.1 The Contractor declares that the Contractor its directors or officers have not suffered any judgments in regard to legislation pertaining to discrimination or harassment in the workplace.

20.2 If such judgments are made against the Contractor, its directors or officers during the life of this SOA, the Senate reserves the right to immediately terminate the SOA. In such cases, the Senate shall only be liable for payment for services performed. No other costs or fees shall be due or payable by the Senate.

## **21. Health and Safety**

21.1 The Contractor, while working in the Senate workplace, must comply with the Senate Policy on Occupational Health and Safety and the Guidelines promoting a scent-free work environment. Particularly this entails:

- a. Refraining or minimizing the use of scented products while in the Senate workplace;
- b. Taking all reasonable measures to protect the health and safety of every employee and other person granted access to the workplace for work purpose; and

- c. No smoking in any buildings or within the vicinity (or within 9 meters) of entrances, exits, windows or air intakes of Senate occupied buildings in the Parliamentary Precinct.

21.2 If Contractors breach those duties and responsibilities, corrective action will be taken which could include measures up to SOA termination. The Senate Policy on Occupational Health and Safety and the Guidelines promoting a scent-free work environment will be available upon request.

## 22. Advertisement

22.1 The Contractor shall not without prior written consent from the Senate, advertise or publicize any work performed to the Senate. Breach of this clause is considered to be a breach of confidentiality and will result in the removal of the Contractor from Senate source files.

## 23. Entire Standing Offer Agreement (SOA)

23.1 This SOA constitutes the entire SOA between the parties with respect to the subject matter of the SOA and supersedes all previous negotiations, communications and other SOAs relating to it unless they are incorporated by reference in the SOA.

## 24. Authorities

### 24.1 Contracting Authority

The Contracting Authority for the SOA is:

*To be Determined*

Finance and Procurement Directorate  
The Senate of Canada  
40 Elgin Street, 11<sup>th</sup> floor  
Ottawa, ON K1A 0A4

Telephone: 613-995-8888  
E-mail: Proc-appr@sen.parl.gc.ca

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

### 24.2 Project Authority

The Project Authority for the SOA is:

*To be Determined*

### 24.3 Contractor's Representative

**The Contractor's representative for the SOA is:**

Account Manager:

*To be Determined*

## 25. Replacement of Specific Individuals

25.1 If specific individuals are identified in the SOA to perform the Work, the Contractor must provide the services of those individuals unless the Contractor is unable to do so for reasons beyond its control.

25.2 If the Contractor is unable to provide the services of any specific individual identified in the SOA, it must provide a replacement with better than or equivalent qualifications and experience. The replacement must meet the criteria used in the selection of the Contractor and be acceptable to the Senate. The Contractor must, as soon as

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possible, give notice to the Contracting Authority of the reason for replacing the individual and provide the name, qualifications and experience of the proposed replacement.

- 25.3 The Contractor must not, in any event, allow performance of the Work by unauthorized replacement persons. The Contracting Authority may order that a replacement stop performing the Work. In such a case, the Contractor must immediately comply with the order and secure a further replacement in accordance with subsection II. The fact that the Contracting Authority does not order that a replacement stop performing the Work does not relieve the Contractor from its responsibility to meet the requirements of the SOA.

## 26. Priority of Documents

- 26.1 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.
- the articles of the RFSO including all annexes;
  - the articles of the SOA;
  - the Contractor's Bid dated *(To be identified upon contract issuance)*.

## 27. Proactive Disclosure

- 27.1 All contracts awarded by the Senate must reflect fairness in the spending of public funds. The Senate is obligated to report every quarter on its website, all contract awarded that have a value of more than \$10,000.00 or whose value has exceeded \$10,000.00 via amendment.

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## PART 6 - TERMS OF WORK AND PAYMENT

### 1. Period of the Standing Offer Agreement (SOA)

- 1.1 The Contractor shall, from **April 1<sup>st</sup>, 2021 to March 31<sup>st</sup>,2024**, perform and complete with care, skill, diligence and efficiency the work that is described in this document.

### 2. Extension of the SOA

- 2.1 The Contractor grants to the Senate the irrevocable option to extend the term of the SOA by up to two (2) additional one (1) year period under the same conditions. The Contractor agrees that, during the extended period of the SOA it will be paid in accordance with the applicable provisions as set out in Section 5 – Price Escalation and Cost.
- 2.2 The Senate may exercise this option at any time by sending a written notice to the Contractor at least two (2) weeks 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 an amendment.

### 3. Option to Extend - Transition Period

- 3.1 The Contractor acknowledges that the nature of the services provided under the SOA requires continuity and that a transition period may be required at the end of the SOA. The Contractor agrees that the Senate may, at its discretion, extend the SOA by a period of 30 days under the same conditions to ensure the required transition. The Contractor agrees that, during the extended period of the SOA, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.
- 3.2 The Contracting Authority will advise the Contractor of the extension by sending a written notice to the Contractor at least 10 business days before the SOA expiry date. The extension will be evidenced for administrative purposes only, through a SOA amendment.

### 4. Financial Limitations

- 4.1 The total cost to the Senate against the resulting SOA must not exceed the sum of **\$XXXX (Applicable Taxes excluded)** unless otherwise authorized in writing by the Contracting Authority. The Contractor must not supply any service which would cause the total cost to the Senate to exceed the said sum, unless an increase is so authorized.
- 4.2 The Contractor must notify the Project Authority as to the adequacy of this sum when 75 percent of this amount has been committed before the expiry date of the SOA, whichever comes first. However, if at any time, the Contractor considers that the said sum may be exceeded, the Contractor must promptly notify the Contracting Authority.

### 5. Price Escalation and Cost

- 5.1 Upon SOA award, all prices quoted in the Contractor's offer Annex "C" – Basis of Payment – Detailed Pricing Listing, will remain firm for a period of three (3) years. Thereafter, on an annual basis, the Contractor may review the price list and may propose increases. Such increases must not be greater than the consumer inflation factor as specified in the Canadian Consumers Price Index for the previous year. The Contractor must provide the Senate with a thirty (30) day written notice for any increase in cost of services proposed. Once this notification is received and accepted by the Senate, prices will remain firm until the next option period is exercised.

### 6. Basis of Payment

- 6.1 In consideration of the Contractor satisfactorily completing all of its obligations under the SOA, the Contractor will be paid in accordance with rates specified in Annex "C" - Basis of Payment – Detailed Price Listing.
- 6.2 The Senate will not entertain any charges which are not specified in the Basis of Payment.



## 7. Invoicing

7.1 The Contractor shall submit a detailed invoice for each call-up. Invoices must show:

- a. date of invoicing;
- b. client's name;
- c. move order and purchase order number;
- d. name of origin and destination subcontractor(s);
- e. mileage;
- f. actual/constructive weight; and
- g. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes

7.2 The Contractor's certified invoice shall be forwarded to:

**The Senate of Canada  
Finance and Procurement Directorate  
40 Elgin Street, 11<sup>th</sup> floor  
Ottawa, Ontario  
K1A 0A4 Canada**

or by e-mail at: [finpro@sen.parl.gc.ca](mailto:finpro@sen.parl.gc.ca)

7.3 The invoice must be reviewed and signed by the Project Manager or their delegated authority before payment is issued.

7.4 Payment by the Senate to the Contractor for work shall be made:

- within thirty (30) days following the date of receipt of an invoice for payment, or within thirty (30) days following the date on which the work is completed, or the goods delivered and accepted, whichever date is the later.

7.5 If the Senate has any objections to the invoice, written notification of the nature of such objections shall be forwarded to the Contractor.

## 8. Method of Payment

8.1 Direct Deposit: The Senate can deposit directly all payments into the individuals/corporation's account. Please submit a completed Annex "E" - Direct Deposit Form with your bid.

8.2 Payments will be addressed and mailed to the name and address indicated on the first page of the SOA.

## 9. Sales Tax

9.1 The Senate is exempt from Provincial Sales Taxes.

9.2 PST Exemption No.: Ontario 11708174G / Quebec: 10-0813-5602-P

9.3 The Applicable Taxes are not included in the resulting call-up amount.

9.4 The Applicable Taxes must be listed as a separate line item on all invoices.

## 10. Interest on Overdue Accounts

For the purpose of this section:

10.1 An amount is "due and payable" when it is due and payable by the Senate to the Contractor according to the terms and conditions of the SOA and resulting call-ups.

10.2 An amount is overdue when it is unpaid on the first day following the day upon which it is due and payable.

10.3 "Date of payment" means thirty (30) days from the date of receipt of the invoice at the Senate.

- 10.4 The “Bank Rate” shall be the average Bank of Canada discount rate for the previous month, plus 3 per cent.
- 10.5 The Senate shall be liable to pay simple interest at the Bank rate on any amount which is overdue from the day such amount became overdue until the day prior to the date of payment inclusively; however, interest will not be payable nor paid unless the amount has been outstanding (unpaid) for more than fifteen (15) days following the due date. Interest shall only be paid when the Senate is responsible for the delay in paying the Contractor. In the event that the Senate is not responsible for the delay in paying the Contractor, no interest shall be paid.
- 10.6 The Senate shall not be liable to pay the Contractor any interest on unpaid interest.

## ANNEX “A” – STATEMENT OF WORK

### 1. GENERAL

#### 1.1 Background

To manage and execute, on an “as and when requested” basis, the physical movement of the personal Household Goods and Effects (HG&E) and Private Motor Vehicle (PMV) of Senators (herein referred to as the Client) across Canada, without delays, loss or damage. The services in support of the movement of HG&E and PMV include the following phases: pre-move consultation, packing, loading, scaling, transportation, unloading, and unpacking.

In the last 5 years, there have been 46 moves:

Fiscal Year	Number of Retired Senators Who Used Moving Services	Number of New Senators Appointed Who Used Moving Services	Total Number of Moves
2016/2017	9	8	17
2017/2018	9	2	11
2018/2019	5	4	9
2019/2020	5	0	5
2020/2021	3	1	4
<b>Total</b>	<b>31</b>	<b>15</b>	<b>46</b>

For the coming five-year period, it is expected that 32 Senators will retire (planned).

Fiscal Year	Estimated Number of Moves
Current vacancies	3
2021/2022	5
2022/2023	3
2023/2024	7
2024/2025	10
2025/2026	7
<b>Total</b>	<b>35</b>

#### 1.2 Purpose

This statement of work defines the services that shall be provided by the Contractor regarding the movement of Household, Goods and Equipment (HG&E) and Private Motor Vehicles (PMV).

### 2. SCOPE OF WORK

#### 2.1 General Requirements

The Contractor shall:

- arrange, administer and manage the complete movement of HG&E and PMVs within the scope of this Standing Offer Agreement (SOA);
- shall coordinate HG&E and PMV movement services and assist the Client;
- shall provide a short list of individuals who will be performing these services, prior to award of the SOA. The SOA shall not be awarded until this list of individuals are security cleared;
- shall notify Senate Security of any new employee who will be working on job for the Senate, throughout the term of this SOA;
- be flexible in arranging service appointments with the Client, when necessary;

- shall provide dedicated telephone services to permit accessibility by the Client. All e-mail and voice mail must be responded to within sixty (60) minutes between 0800 to 1700 hours (local time) on workdays; and
- shall reply to emails and voice mails sent by the Project Manager during business hours and within 24 hours of receipt on workdays.

### 3. **RESPONSIBILITIES**

#### 3.1 **Contractor Responsibilities**

The Contractor shall:

- retain a designated bilingual Account Manager who will be responsible for all communication between the Contractor and the Senate;
- provide a bilingual (advanced level language proficiency) Project Manager who will supervise all Client moves;
- ensure the availability of a back-up resource for the Account Manager and Project Manager in the event of an unexpected absence;
- forward the pre-move information booklet(s) to the Client prior to the pre-move telephone pre-move inspection;
- advise the Client of their responsibilities in preparation of the move;
- provide moving services to Clients in accordance with the terms and conditions of the agreement;
- provide a list of inadmissible or restricted items, to the Senate, for every move;
- have the capability to provide services throughout all of Canada, from coast to coast (Eastern provinces, Central provinces, Western provinces and Nunavut.);
- be responsible for all phases of the provision of moving services regardless of who is providing the service on the Contractor's behalf;
- ensure the sustainment of the high quality of the services being provided;
- maintain the Subcontractor Management Plan delivered with the Contractor's offer submission. The Subcontractor's Management Plan must be acceptable to the Senate, and the Project Authority must be notified of any changes to the plan. An overview of what is expected is outlined in Appendix "5" – Subcontractor Management Plan
- coordinate all contracted services with the applicable subcontractor, if applicable;
- ensure customer service expectations are understood by the Contractor's personnel;
- ensure that clear, concise, complete and timely information is provided to the Project Authority when addressing any issues of concern or appeals;
- comply with all applicable Federal and/or Provincial health and safety laws;
- possess the knowledge related to sequential packing, pick-up, transportation, delivery, unpacking and set up of HG&E;
- ensure all workers are fully bonded and have passed a criminal record check
- be responsible for determining and providing the type of vehicles that are needed and how many workers are required for each move;
- provide all equipment / items (consumable and non consumable) necessary to perform each move;

- respect the work schedules provided including the specified arrival time;
- provide an adequate number of **security cleared personnel** in order to perform the move under each call-up;
- complete and return the Annex “F” - COVID Form three (3) business days prior to the move taking place in any Senate building in the parliamentary prescient;
- ensure that employees complete a COVID screening questionnaire on the day they wish to enter any Senate Building. Employees are expected to follow all Senate COVID protocols in place (restricted elevator use, directional hallways, use of facemasks, etc.)
- be responsible for ensuring that drivers are fully trained and licensed to operate the motor vehicle and are experienced movers/packers;
- ensure that Personnel display the Contractor’s name or logo on their outer garment(s) for identification purposes. The personnel shall also carry a personal identity card of the Contractor with them and show it whenever they are asked to do so at any move location.

### 3.2 Contractors responsibilities related to the office of the Senator (Client)

The Contractor shall:

- ensure all services are provided in the official language of the Client’s choice;
- provide all printed material in the official language of the Client’s choice;
- provide the Client with copies of all signed documentation;
- ensure that all pre-move consultation, pre-packing/packing, loading, unloading, and unpacking services commence no earlier than 0800 hours and cease no later than 1930 hours (local time) from Monday to Friday, excluding weekends and statutory holidays. Delivery or unpacking on weekends or statutory holidays may be authorized with mutual agreement between the Client and the Contractor, as long as there is no additional cost to the Senate of Canada;
- not commence any service that cannot be completed by 19:30 hours on the same day;
- confirm, at least 24 hours prior to each service delivery, the exact timing when the prepacking, packing, loading, unloading and unpacking services will be rendered;
- adhere to the mutually agreed upon times;
- promptly notify the Client of any delays in excess of one (1) hour; and
- notify the Client immediately when a HG&E or PMV shipment has incurred loss or damage from an incident such as, but not limited to:
  - a. transportation accidents where injury, loss or damage has occurred;
  - b. major automation failures (12 hours or greater);
  - c. break and entry and/or theft involving HG&E shipments;
  - d. mechanical breakdowns (24 hours or greater); and
  - e. loss or major damage to residences, property, HG&E or PMV. Major damage is when the estimated damage repair value is in excess of \$10,000, or in the case of a PMV, an insurance write-off.

### 3.3 Contractor Responsibilities Related to the Senate Project Authority

The Contractor shall:

- notify the Project Authority immediately when services cannot be completed to determine the appropriate course of action;

- maintain a contingency plan to meet the service requirements specifically to address issues such as load levels beyond normal patterns; loss of critical employees or subcontractors; business interruption of subcontractors and any other factors that may adversely impact service delivery;
- notify the Project Authority immediately when a HG&E or PMV shipment has incurred loss or damage from an incident, or when there is uncertainty as to the estimated damages to the Client's HG&E or PMV; and
- notify the Project Authority immediately regarding major incidents with Clients such as an altercation, theft or serious disagreement

### 3.4 Contractor's Account Manager Requirements/Responsibilities

The Contractor's Account Manager shall:

- have the authority to represent and make decisions on behalf of the Contractor with respect to all contracted moving services;
- attend all meetings planned or requested by the Project Authority;
- present to the Project Authority any recommendations for changes or revisions to the requirement;
- monitor, follow up and provide timely reports to the Project Authority for any unusual situation that warrants increased awareness, visibility and attention; and

### 3.5 Senate of Canada Responsibilities

The Senate of Canada shall:

- provide name and information on the Client that requires the moving services;
- advise the Contractor of concerns with the performance of services;
- review and respond to any Contractor objections/appeals to service performance decisions;
- perform security clearance for the company's personnel;
- provide clarifications to the Client and Contractor regarding any of the technical aspects of the work involved, as required;
- review and approve the work estimate and pre-move inventory list provided to Clients by the Contractor;
- advise the Contractor if there are known particular circumstances that they should be aware of prior to contacting the Client, or the Client's delegate, or providing on-site services; and
- advise the Client and the Contractor of any restrictions.

## 4. SECURITY CLEARANCE

- The Contractor must ensure that all employees assigned to a move are security cleared to a level determined by Senate Security.
- The Senate shall not allow any employee on site who does not have the required clearance.
- **NOTE:** Senate requires approximately two (2) weeks to perform a security clearance on an employee as cases may vary.
- The Contractor shall advise Senate Security of any deletion or addition to the listing and provide completed security forms on new individuals in a timely manner.

## 5. HOUSEHOLD GOODS AND EQUIPMENT (HG&E)

### 5.1 Pre-move Consultation of HG&E

The pre-move consultation is the initial face-to-face contact between the Contractor and the Client that sets in motion the move process. Early identification of issues at this initial stage can prevent and reduce problems that could arise during the move. No Senate parking is available for this consultation.

The following shall form part of the pre-move consultation process. This listing is not all inclusive.

The Contractor shall:

- conduct a pre-move consultation at the Senators' residence and/or office, if required, or conduct a detailed telephone pre-move consultation, in lieu of the face-to-face consultation, for moves out of locations not readily accessible by all-weather roads;
- request approval from the Project Authority to delay conducting the pre-move consultation if the prescribed time limit, identified by the Contractor, cannot be met provided that an alternate date can be agreed upon with the Client;
- forward immediately the pre-move information booklet(s) to the Client by email or courier to review and refer to during the call when a telephone pre-move consultation is to be conducted;
- advise the Client that unrestricted access to the HG&E is required on the pre-move consultation day to ensure that an accurate assessment can be performed;
- notify the Project Authority immediately to determine the appropriate course of action when the Contractor determines that a complete and accurate pre-move consultation cannot be conducted;
- explain thoroughly the Replacement Cost Protection (RCP) coverage and limitations in detail to the Client to ensure coverage is understood. As a minimum, the following shall be explained to the Client:
  - a. the limitations of the coverage;
  - b. availability and cost of additional coverage, if required;
  - c. all relevant exclusions;
  - d. any special requirements for items of high value such as artwork, jewellery, or cameras;
  - e. statutory time limits;
  - f. contractor claim department contact information;
  - g. claim filing instructions;
  - h. the requirement for preparing and certifying major articles and appliances for shipment, as applicable;
  - i. that the signing of the inventory listing and/or the unpacking certificate shall not preclude claims for loss or damaged of packed items where the loss or damage is not annotated at the time of delivery; and
- obtain the Client's signature confirming receipt of the information on the RCP coverage and conditions;
- provide the Client with a list of all major articles and appliances that require servicing and certification prior to, or on the final day of packing. The Client is to be advised of their responsibility to make these major articles and appliances accessible for servicing/certification;
- provide the Client with a room-by-room weight estimate (hereafter referred to as pre-move weight estimate) preferably at the time of the consultation, but no later than the next business day. This pre-move weight estimate is to be completed on a room-by-room basis and is to itemize each piece of furniture, the estimated number of cartons by cubic measure, the estimated weight of HG&E by room, and the total estimated weight of HG&E;

- use the pre-move weight estimate to produce the pre-printed inventory listing that is used on load day. The Project Authority requires the Contractor to produce accurate inventory listings. Additions must be legible and include an accurate description, and void items must be clearly noted;
- ensure that the Client is aware that if any HG&E is removed from the shipment after the pre-move consultation, the Client has to advise the Contractor accordingly so that the weight estimate can be amended before the move date. The Contractor shall provide the revised weight estimate to the Project Authority with the revised pre-move weight estimate no later than the next business day; and
- advise the Project Authority immediately when the Client wishes to add HG&E to the shipment after the pre-move consultation. The Project Authority will provide authorization on a case-by-case basis.

## 5.2 Pre- Packing/Packing of HG&E

Packing services include the packing of all HG&E, article and appliance preparation and certification, disassembly of furniture and other items, inspection of any cartons packed by the Client (for inadmissible items) and crating when required by the Contractor.

The following shall form part of the pre-packing/Packing process. This listing is not all inclusive.

The Contractor shall:

- ensure the preparation and certification of major articles and appliances for shipment is completed;
- provide packing services in accordance with the standards described in Appendix “3” – Packing and Wrapping Standards;
- complete packing of non-essential day-to-day living items on the day prior to the move date;
- not pre-pack any items which would have been identified by the Client as essential for day-to-day living; and
- schedule the pre-pack date and time with the Client, preferably during the pre-move consultation.

## 5.3 Loading of HG&E

Loading includes hoisting, lowering, rigging, and the obtaining of parking permits, if required.

The following shall form part of the loading process. This listing is not all inclusive.

The Contractor shall:

- perform only one pick-up of HG&E;
- use all precautions to protect HG&E from damage and loss;
- protect all HG&E from natural elements (e.g. rain, snow or sun) and theft at all times;
- disassemble pieces of furniture and any other items as required;
- tag and condition the HG&E, with the Client’s participation, using the pre-printed inventory listing;
- place all HG&E inside the conveyance. The drayage of any items outside the conveyance (e.g. on tailgate) is expressly prohibited;



- provide the Client with a copy of the inventory listing which is to be signed and dated by both the Contractor and the Client;
- remove any accumulated unused packing materials and other debris incidental to packing from the Client's residence and/or office; and
- sign and date the Bill of Lading along with the Client.

#### **5.4 Confirmation of HG&E Actual Weight**

The following shall form part of the weighing process. This listing is not all inclusive.

The Contractor shall:

- ensure that the vehicle has full fuel tanks prior to scaling; and
- ensure that fuel receipts obtained prior to scaling and weigh scale ticket(s) are available for inspection at any time during the loading, transportation and unloading phases.

#### **5.5 Weigh Scale Documentation Requirements of HG&E**

The following shall form part of the loading process. This listing is not all inclusive.

The Contractor shall:

- ensure each of the scale tickets contains all of the following, clearly legible pieces of information:
  - a. name of the Client;
  - b. name and address of the scale;
  - c. name of the driver;
  - d. tare and gross weights;
  - e. time and date annotation for each scaling operation;
  - f. signature, electronic or otherwise, of the Scale Master; and
  - g. move order number.
- ensure authorized scales that produce handwritten tickets are only to be used if there are no authorized scales available at origin or destination that produces printed tickets. If an authorized scale which produces handwritten tickets is the only scale available at origin, the Contractor shall ensure that all of the information requirements are included.

#### **5.6 Scaling at Origin of HG&E**

Unless otherwise specified, the Contractor must ensure that all shipments are accurately scaled.

The following shall form part of the loading process. This listing is not all inclusive.

The Contractor shall:

- use an authorized weigh scale located within an 80 kilometres radius of origin;
- use the same prime mover and conveyance pair;
- obtain the tare weight, no more than 24 hours prior to delivery;
- obtain the gross weight, no more than 24 hours after the requested date of service;
- obtain tare and gross weights at the same weigh scale. The Contractor shall be responsible to ensure that the hours of operation of the selected weigh scale will meet both scaling requirements;
- obtain the tare and gross weight on a weigh scale which is open upon completion of loading or on Saturday, when the load date is on a Friday; and

- contact the Project Authority immediately when the net weight obtained (i.e. gross weight less the tare weight) exceeds the weight specified on the move order, or when the Contractor suspects a scale is providing an inaccurate weight.

### **5.7 Scaling at Destination of HG&E**

The Contractor shall:

- scale at destination when there are no authorized scales within an 80 kilometres radius of origin;
- ensure shipments are accurately scaled, as follows:
  - a. at an authorized weigh scale located within an 80 km radius of destination;
  - b. using the same prime mover and conveyance pair;
  - c. obtaining the gross weight, no more than 24 hours prior to delivery;
  - d. obtaining the tare weight, no more than 24 hours after date of service; and
  - e. obtaining gross and tare weight at the same weigh scale.
- be responsible to ensure that the hours of operation of the selected weigh scale will meet both scaling requirements; and
- contact the Project Authority immediately when the net weight obtained (i.e. gross weight less the tare weight) exceeds the weight limit specified on the move order, or when the Contractor suspects a scale is providing an inaccurate weight.

### **5.8 Reweigh Required by the Senate of Canada of HG&E**

The Contractor shall:

- reweigh a shipment prior to delivery:
  - a. upon request of the Senate of Canada; or
  - b. when the Contractor suspects a scale is providing inaccurate weight.
- submit the original weigh scale tickets from each scaling procedures to the Project Authority.

### **5.9 Transportation of HG&E**

Transportation of HG&E encompasses the road transport (i.e. long haul moves and local moves) phase of the shipment from origin to destination and is inclusive of the use of public ferries and shuttle service.

The Contractor shall:

- provide a prime mover and conveyance in accordance with Appendix “4” – Vans/Vehicles/Containers and Equipment Standards; and
- ensure the timely and safe dispatch, load, pickup and delivery of HG&E shipments.

### **5.10 Delivery/Unloading of HG&E**

The Contractor shall:

- perform only one delivery of HG&E which must be at the specified destination address;
- unload and place HG&E in the corresponding rooms as per the inventory listing, or as directed by the Client;
- re-assemble pieces of furniture and any other items that were disassembled at origin by the Contractor;
- prepare major articles and appliances for use;

- assist the Client in annotating visible damage and/or loss on the inventory listing prior to the Client signing for receipt of HG&E;
- annotate damaged cartons immediately on the inventory listing;
- provide the Client with a copy of the signed inventory listing before departing the residence. The signing of the inventory listing at this time shall not preclude any claim for damage and/or loss where damage is not readily visible at the time of delivery; and
- sign and date the Bill of Lading along with the Client.

### 5.11 Unpacking of HG&E

Unpacking services include the unpacking of all HG&E, re-certification of the major articles and appliances, uncrating and removal of all packing material/debris.

The Contractor shall:

- commence unpacking services no later than the next business day after unloading;
- unpack the contents of all china barrels, cartons, and crates at an appropriate pace to avoid overwhelming the Client. The Contractor is to allow the Client a manageable period of time to put items away in an organized manner as the contents are unpacked;
- remove all Contractor's packing material and empty containers from the residence on completion of unpacking; and
- not be responsible for the disposal of packing material and empty cartons, if unpacking services are refused by the Client.

### 5.12 Unpacking Documentation of HG&E

- Loss/Damage Packed Items Form: The Contractor shall assist the Client in annotating all losses and/or damages. The Contractor shall provide a copy of the completed form, signed and dated, to the Client.
- Unpacking Certificate: The Contractor shall obtain the Client's signature and date on the Unpacking Certificate once unpacking services have been completed to the Client's satisfaction. The Contractor shall provide a copy of the completed form, signed and dated, to the Client.

## 6. Private Motor Vehicle (PMV)

### 6.1 Private Motor Vehicle (PMV) Shipment Services

The Contractor shall:

- administer and manage PMV shipping services and activities;
- shall not be shipped a broken-down PMV at the Senate's expense. If the Contractor is concerned with the operating condition of the PMV, the Client will be required to provide the Contractor with a copy of the valid provincial safety inspection certificate. The Contractor shall not refuse to accept a PMV that is in safe operating condition based solely on its age.
- shall ensure the timely and safe transportation of PMV shipments.
- with the authorization of the Project Authority, may ship a PMV with the HG&E. In such instances, the weight of the HG&E shipment can be determined as follows:
  - a. using the PMV weight contained in the Sanford Evans Motor Vehicle Data Book which shall be deducted from the actual weight of the shipment; or
  - b. scaling the HG&E shipment prior to loading the PMV.

## 6.2 Pre-Move Consultation for PMV

The Contractor shall:

- contact the Client to confirm PMV particulars, advise the Client of the cleaning and documentation requirements, and coordinate the PMV pickup time;
- advise the Client of any items that need to be removed from the PMV and any tasks the Client is responsible to perform prior to shipment; and
- contact the Client in advance of the delivery date to reconfirm the timing for PMV pick-up at the Client's residence.

## 6.3 Acceptance & Pick-up of PMV

The Contractor shall:

- ensure the PMV has been prepared for shipment in accordance with the Contractor's instructions;
- provide instructions to the Client if corrective action is required prior to accepting the PMV. The Client is responsible for subsequent arrangements. The delivery date may be adjusted, if required;
- complete the Vehicle Condition Report which shall be witnessed and signed by the Client; and
- obtain any special operating instructions from the Client to avoid potential issues in route.

## 6.4 Transportation of PMV

The Contractor shall:

- annotate the location of the license plates on the Vehicle Condition Report if they are removed;
- contact the Project Authority for agreement on the proposed course of action if a PMV becomes inoperable at any point during the shipment; and
- notify the project authority on the same day, followed by a written notice, indicating the intervention and corrective action taken if there is major damage (over \$5,000.00) or complete loss of PMV, or break and entry/theft.

## 6.5 Delivery of PMV

The Contractor shall:

- obtain delivery instructions once the PMV has arrived at destination; and
- inspect the PMV with the Client to compare the condition to the Vehicle Condition Report prepared at origin. Any variations must be clearly annotated on the Vehicle Condition Report and be signed by both the Client and the Contractor.

## 7. HG&E and PMV Replacement Cost Protection and Claim Settlement

The Contractor shall provide Replacement Cost Protection for any loss and/or damage of HG&E and PMV, in accordance with Appendix "1" – Replacement Cost Protection.

The Contractor shall:

- track loss/damage reports to ascertain and correct any unsatisfactory services;
- provide recommendations and action plans to address areas of incidence of loss and damage;

- provide comprehensive claim settlement services;
- maintain all necessary claims documentation for seven (7) years, as required by the Senate;
- provide the claims documentation to the Senate on request during the contract, or after the expiry date of the Contract once all claims have been closed, at no charge to the Senate; and
- make every effort to ensure that loss and damage is eliminated or at least minimized. The Senate will monitor loss and damage claim information carefully to ensure that positive steps are being taken to reduce claims and provide undisputed settlements.

### 7.1 Residence Safekeeping

- The Contractor shall properly protect the residence from inadvertent damage.
- The Contractor shall be liable for replacement/repair costs for damage to the origin and destination property (e.g. scratching of hardwood flooring, water damage due to Contractor disconnection of washing machines or any other appliance with fixed water lines, marring of wall paint), caused by the Contractor. This also applies to any adjacent property where the damage is caused by the Contractor.
- Claims for damage to property shall be addressed expeditiously as follows:
  - a. Damage to origin property: The Contractor shall arrange for the repair and/or replacement of damaged property within five (5) business days from the reporting date.
  - b. Damage to destination property: The Client will submit a claim separate from the HG&E claim, for any damage. This claim will be addressed and settled within thirty (30) calendar days from the delivery date.

### 7.2 Post Work Evaluation:

Following the completion of each requirement, the Client's staff will be asked to complete Annex "G" - Services Evaluation Form. This form is a tool which will be used to provide feedback on the quality of the services received. A copy of the completed form will be provided to the Contractor, so that they may in future requirements, address any comments or suggestions made by the Client.

### 7.3 Reporting:

- On the last day of every quarter (April-June, July-September, October-December and January-March) or as requested, the Contractor must provide electronically to the Senate Project Authority a report of all moves completed or in process during the stipulated period. This report will contain at a minimum, the following information:
  - a. The Client's name (Senator)
  - b. Purchase order number
  - c. Origin and destination of the move
  - d. Start date of the move
  - e. Completion date of the move
  - f. Total weight of the move
  - g. Total cost of the move (HG&S)
  - h. Cost of moving a vehicle (PMV)
  - i. Total cost to-date of all moves to the Senate
- On April 1<sup>st</sup> of each year, if requested, the Contractor shall provide a report of all the move completed or in process during the preceding 12-month period.
- Every 6 months (April and September) or as requested, the Contractor shall provide electronically to the Senate Project Authority, a report of all claims that occurred within that period or within the period requested. This report will contain at a minimum, the following information:

- a. The Client's name (Senator)
- b. Order account number
- c. Origin and destination of the move
- d. Start date of the move
- e. Completion date of the move
- f. Date of the claim
- g. What was damaged
- h. The status of the claim
- i. The total value of the claim
- j. If not resolved, tentative date of resolution.

#### 7.4 Claim Settlement Process

Once a Client has indicated their intent to submit a claim for loss or damages, the Contractor must commit to the claim settlement process. Claims settlement services are not to be sub-contracted and co-insurance does not apply.

In all cases the Contractor shall:

##### **For Household Goods & Equipment (HG&E):**

- provide claim settlement services, and all related documentation, in the official language of the Client's choice;
- assign an account manager to oversee these services to provide a consistently high level of claims settlement satisfaction;
- clearly inform the Client in writing of the loss or damage claim process by providing clear and concise instructions regarding how they are to file a claim. The instructions must also include statutory limitations, indicate that one (1) supplementary claim will be allowed within the ninety (90) calendar days, and outline settlement procedure(s) as well as the timelines that must be followed. Flexibility in allowing claimants to submit and modify claims up to ninety (90) calendar days after the delivery date is required as is entertaining an extension when warranted by extenuating circumstances;
- provide a HG&E Statement of Claim form to the Client within five (5) business days of the request to submit a claim;
- assist the Client, when required, to complete the Statement of Claim form, in certifying evidence of loss or damage, and fully answering questions regarding the completion of the form and the claim settlement process;
- acknowledge receipt of and commence settlement action on a properly documented claim within seven (7) calendar days;
- provide the Client with a main point of contact to oversee and provide guidance regarding the claim's settlement process;
- provide the Client with a complete and reasonable settlement within sixty (60) calendar days of receipt of the properly documented claim; and
- provide the Client with a fully itemized report with each settlement cheque, with full explanation of any denials. In the event that there is a disagreement between the Contractor and the Client, the Contractor shall ensure that any documentation pertaining to a claim is made available to the Project Authority upon request.
- provide the Project Authority with copies of claims and documentation on request.

##### **Private Motor Vehicle (PMV):**

- provide replacement cost protection (RCP) for the loss or damage that is attributable to incidents that occurred while the Client's PMV was in the possession of the Contractor. The Contractor's liability to the Senate of Canada for such loss or damage is not limited by any provision of the Bill of Lading applicable to such goods, nor shall the exceptions to liability contained in such Bill apply to the Client;

- waive any provision in such Bill of Lading that places a maximum dollar value on the liability of the Contractor for such loss or damage, or that establishes an exception to liability;
- waive any provision implied or imposed by law which limits the liability of the Contractor for such loss or damage, or that establishes an exception to such liability, to such an extent such waiver is permitted by law; and
- be responsible for RCP for all phases of the move regardless of who is providing the service on the Contractor's behalf.
- advise the Client to file their claim within twenty (20) business days of the PMV delivery date. Under exceptional circumstances, the Client may apply to the Contractor for an extension to the claim filing time limits;
- provide a PMV Statement of Claim form to the Client within five (5) business days of the request to submit a claim;
- provide the Project Authority with copies of claims and documentation on request.

### **Coverage**

The Contractor shall ensure that PMV RCP coverage is based on the following:

- For a PMV that is not listed in the Canadian Red Book (Official Used Car Valuations and Canadian Older car/light truck) due to its recent purchase from the manufacturer's dealer, the actual cost of the PMV as stated on the bill of sale provided by the Client;
- For a used PMV, the value of the PMV as listed in the Canadian Red Book (Official Used Car Valuations and Canadian Older car/light truck) dated the month of loading;
- For a used PMV which is not listed in the Canadian Red Book, the insurance coverage will be based on an appraisal provided by the Client from a professional appraisal firm. The appraisal must not be more than thirty (30) calendar days old;
- An additional \$1,000 of insurance coverage will be provided to cover the costs of accessories and auxiliary equipment which are not otherwise included in the Canadian Red Book Value.

### **7.5 Contractor Operation of PMV**

If, based on the origin and destination PMV odometer readings, it is apparent that the PMV was driven in excess of eight (8) kilometers while in the possession of the Contractor, without the Client's permission, the Contractor shall compensate the Client the kilometric allowance in accordance with the Treasury Board Travel Directive (<https://www.njc-cnm.gc.ca/directive/d10/v238/s658/en>) as well as any other charges, fees, tolls incurred that may otherwise be directed to the Client as the registered PMV owner.

### **7.6 Exclusions**

Items excluded from the RCP coverage are loss of market value to any PMV that has been damaged and repaired by the Contractor.

### **7.7 Basis of Settlement**

- The Contractor shall cover the costs associated with any estimates and other documentation required in order to provide such information to the Client in cases of loss or damage during loading, transportation, and/or unloading of the PMV.
- In the event of a major loss, the Contractor shall hire, at its own expense, a private third-party professional insurance adjuster to work with the Client to settle the claim.

- In the event that a PMV cannot be delivered due to major loss or damage, or is delivered in a damaged condition where the period of repair will exceed two (2) calendar days, the Contractor shall take action within one (1) calendar day to authorize the Client to rent a comparable vehicle for the period of time it will take to perform the repairs. The rental vehicle must be equivalent in size to the Client's PMV and include collision coverage, damage waiver, and additional mileage charges beyond the free allowance. All of the associated rental vehicle costs are to be borne by the Contractor.
- When a PMV was operating normally at origin, the Contractor will be liable for any mechanical or electrical malfunction of the PMV including in particular any malfunction of or damage to the engine, drive train, transmission, suspension or exhaust system even if no external damage or proof of abuse/mishandling of the PMV is noted at the time of delivery. In the event of a disagreement, the Contractor shall hire, at their own expense, an independent professional insurance adjuster to investigate the circumstances surrounding the damage.



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## APPENDIX “1” - REPLACEMENT COST PROTECTION

### **Household Goods and Effects (HG&E)**

#### **1. General**

The Contractor shall:

- provide replacement cost protection (RCP), as hereinafter described, for physical loss or damage that is attributable to Contractor mishandling and incidents which occur during pre-packing, packing, loading, transportation, unloading and unpacking of the Client’s HG&E. The Contractor’s liability for such loss or damage shall not be limited by any provision in the Bill of Lading applicable to such HG&E, nor shall the exceptions to liability contained in such Bill of Lading apply;
- waive any provision in such Bill of Lading that places a maximum dollar value on the liability of the Contractor for such loss or damage, or that establishes an exception to liability;
- waive any provision implied or imposed by law which limits the liability of the Contractor for such loss or damage, or that establishes an exception to such liability, to such an extent such waiver is permitted by law; and
- be responsible for RCP for all phases of the move regardless of who is providing the service on the Contractor’s behalf.
- Notify the Senate 30 days prior to cancellation or termination of the insurance.

#### **1.1 Optional Coverage Provisions**

When the Client has high value items that would require optional insurance (i.e. artwork, antiques, collectibles) the Contractor may make available additional optional coverage, if required, at the Client’s own expense.

#### **1.2 Articles & Appliances**

The Contractor shall be liable for replacement/repair costs for damage to the Client’s major articles and appliances that were certified to be in operating condition at origin but were not in operating condition at destination.

#### **1.3 Basis of Settlement**

- For purposes of this contract, the date of discovery of the loss or damage by the Client, or reported to the Client by the Contractor, shall be deemed to be the date the loss or damage occurred;
- In order to expedite a claim, the Contractor may offer a reasonable appearance allowance for minor damage, such as a small scratch or dent, to an article which the Client does not wish to have repaired or replaced. In such instances, the liability of the Contractor shall be limited to the lesser of the cost to repair (including all applicable taxes) or the depreciated value of the item;
- The Contractor is responsible for all costs associated with obtaining any repair estimates or other documentation required by the Contractor;
- In the event that a shipment cannot be delivered due to major loss or damage, the Contractor is to take immediate action to permit the Client to move into the residence, commence housekeeping (i.e. sleeping, the preparation and consumption of meals), or be liable for the cost of commercial meals, lodgings, at the prevailing Treasury Board rates (<https://www.njc-cnm.gc.ca/directive/d10/v238/s659/en>) from the date of delivery;
- In the event of a contentious claim, the Contractor may hire, at their own expense, an independent professional insurance adjuster to assist the Contractor in resolving the claim. The Senate reserves the right to require that the Contractor use an independent professional insurance adjuster, at the Contractor’s expense;

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- In the event of a major loss, the Contractor must hire, at its own expense, an independent professional insurance adjuster to work with the Client to assist the Contractor in settling the claim.
  - Where the Contractor pays the replacement value of a damaged item, the damaged item becomes the property of the Contractor.

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## APPENDIX “2” - GENERAL RULES AND REGULATIONS

### 1. Addressing Unsanitary/Contaminated HG&E

- 1.1 As a guideline, HG&E may be deemed unsanitary/contaminated when it contains excessive mould, mildew, fleas, blood, vermin, excrement, noxious fumes and/or irritants. Additionally, offensive odours that result in personnel not being able to remain in the residence are considered unsanitary. As these situations are very sensitive, they shall be dealt with in a professional manner and with the utmost discretion and confidentiality.
- 1.2 During the pre-move consultation or during the packing or loading stage, if the Contractor identifies the HG&E as unsanitary, the Project Authority must be notified of the specific facts on the day of discovery. Careful assessment during the pre-move consultation to identify issues will allow time to address and resolve the situation.
- 1.3 The Contractor will inform the Client to have the situation rectified. Upon confirmation that the observations are resolved, the move order will be executed as originally issued. The Contractor may re-inspect the Client’s residence if deemed warranted. The service date will only be changed when the HG&E is not acceptable and safe to be serviced.
- 1.4 In extreme circumstances, the Project Authority, in consultation with the Contractor, may cancel the move order. Such situations will be addressed on a case-by-case basis.
- 1.5 HG&E that is identified as unsanitary/contaminated on the day of delivery will not be delivered under any circumstances due to the potential risk of contamination of the residence/attached residences and/or health issues for the family.

### 2. Servicing/Certification of Major Articles & Appliances

#### 2.1 Servicing/Certification at Origin

On the final day of packing, the Contractor shall:

- a. ensure that a certified technician certifies the operating condition of all major articles and appliances;
- b. ensure that a certified technician prepares articles for shipment in accordance with manufacturer’s specifications by:
  - blocking, unblocking and/or draining of washing machines. The Client is to be advised by the Contractor of their responsibility to provide the Contractor with any custom blocking device for front loading washing machines when required to protect against damage during movement as noted in the manufacturer’s instruction manual. If the custom blocking kit is not provided, the Contractor is released from liability if related damage occurs; and
  - draining of ice making refrigerators and portable dishwashers.
- c. provide the Client with a copy of the form listing all the major articles and appliances prepared and certified for shipment. This form must be signed and dated by both the Contractor and the Client.

#### 2.2 Servicing / Re-Certification at Destination

On the unpack day, the Contractor shall ensure the preparation for use and the re-certification/confirmation of the operating condition of major articles and appliances at destination. This action shall be completed by no later than the day of unpacking.

### 3. Acceptance of Client Prepared Items

The Contractor shall accept the following items if the Client prepares them in accordance with the manufacturers’ instructions, or as outlined below:

- Scuba diving tanks shall be emptied, the pressure valve removed, and a dust cap installed;
- Waterbeds and hot tubs shall be drained;
- Combustion engine fuel tanks shall be drained;
- Home fitness equipment shall be disassembled;
- Baby/infant cribs shall be disassembled;
- Outdoor articles such as garden and patio furniture and other outdoor apparatus of a similar nature shall be disassembled and cleaned. The disassembled items must be able to fit inside a normal conveyance;
- The Client must provide the Contractor with instructions on how to disassemble and assemble wall units, and assist if necessary;
- The mechanical components of clocks (e.g. grandfather) shall be prepared for shipment by securing the pendulum, removing weights, and securing the chains;
- CD, Video Cassette Recorder, DVD and Blu Ray players or similar items shall be prepared for shipment by removing all removable storage media (e.g. discs, tapes and SD cards), if applicable;
- All batteries shall be removed from household items and disposed of appropriately;
- Non-restricted firearms shall be prepared, documented, and packed in conjunction with the Contractor with strict adherence to federal regulations; and
- All mechanical components of pianos shall be prepared for shipment.

#### **4. Items Accepted at Client's Risk**

- 4.1 The Contractor may accept, at their discretion, the following items provided the Client agrees that the Contractor is not liable for any loss or damage to these items:
- house plants
  - dried flowers; and
  - green ware (pottery)
- 4.2 The Contractor will not be liable for any damage the above noted items may cause to other HG&E articles being shipped.

#### **5. Items Requiring Specialized Handling**

If for safety reasons and/or to avoid unnecessary damage to the residence, it is determined that an item cannot be moved to or from a particular location in the residence without professional handling services, the Contractor shall:

- 5.1 identify to the Client the items requiring specialized handling during the pre-move consultation; and
- 5.2 inform the Project Authority of the items requiring specialized handling and obtain authorization to proceed as agreed.

#### **6. Move Delay or Cancellation by the Senate of Canada**

- 6.1 When a move order must be delayed or cancelled, the Project Authority will inform the Contractor and determine the appropriate follow-up action.
- 6.2 If a move order is cancelled prior to pack day, the Contractor will not receive any compensation for this move.

#### **7. Pre-move Weight Estimate**

- 7.1 The Contractor shall produce a room-by-room pre-move weight estimate (hereafter referred to as Pre-move Weight Estimate) of the Client's HG&E.
- 7.2 During the pre-move consultation, the Contractor shall identify all items to be shipped. The pre-move weight estimate must include every piece of furniture, including all components, loose items, accepted owner packed cartons, and quantity of cartons to be packed by the Contractor.
- 7.3 The cubic formula (length x width x height) will be used to obtain the estimated weight of areas of the residence that are difficult to access.

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## 8 Procedures for Inventory Listing

8.1 The Contractor shall produce accurate inventory listings capturing all items to be shipped.

8.2 The following guidelines will apply to the inventory listing:

- after packing has been completed and prior to printing the final inventory listing, the Contractor must only capture pieces of furniture, including all components, and other articles requiring conditioning within the current room location and add articles that were not captured at time of the pre-move consultation;
- the final inventory listing produced for the Contractor's use shall provide a room-by-room breakdown of household goods and other articles requiring conditioning;
- The Contractor packed cartons, miscellaneous items not requiring conditioning and the accepted packed by owner containers do not need to part of the preprinted inventory listing;
- The Contractors shall produce a clear inventory listing with conditioning that clearly reflects the actual condition of the piece of furniture or article;
- the Contractor shall use the inventory listing when tagging and conditioning all pieces of furniture, including all components, and other articles requiring conditioning. Every effort shall be made to match goods with the entries on printed inventory listing to minimize handwritten amendments/additions;
- The Contractor shall ensure all handwritten entries on the inventory listing are neat, legible and include a clear description; and
- where possible, inventory listing will only contain one room per page.

8.3 Exceptions

Viewing rooms which are difficult to access and/or assess – In circumstances where difficulties encountered by the Contractor to estimate the weight in areas which are difficult to access (i.e. attics, crawl spaces), the cubic formula (length x width x height) will be utilized to obtain the estimated weight and a handwritten inventory is authorized for that portion of the shipment.

## 9 Pre-move Consultation Price Estimate

The pre-move consultation price estimate may be adjusted to a maximum of 10% above the original consultation price estimate, upon acceptance and approval of the Client and the Project Manager.

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## APPENDIX “3” – PACKING AND WRAPPING STANDARDS

### 1. Pre-Packing / Packing Materials

All packing containers and materials will be in new or sound condition and adequate for their intended use. They must be dry, clean, and free from vermin, acid, paint, grease, and all other substances injurious to the articles packed. If material is not new, then all marks pertaining to any previous usage will be completely obliterated prior to reuse. Only new material shall be used for packing mattresses, box springs, linens, bedding and clothing. Egg crates, orange crates, and similar types of containers shall not be used.

#### 1.1. Crates

Crates may be made of lumber, plywood or solid fiber and will be well-manufactured and free from imperfections that will affect their utility. Size and spacing of nails will be in accordance with the best commercial practice. All unclenched nails will be either cement coated or chemically etched.

#### 1.2. Cartons

Cartons constructed of solid or corrugated fiberboard will have a minimum average bursting strength of two hundred (200) pounds per square inch. With the exception of mattress cartons, the total of the inside dimensions of the carton (length x width x height) will not exceed seventy-five (75) inches with a maximum weight limitation of sixty-five (65) pounds.

#### 1.3. Fiber Drums, Dish Packs, and Cartons

Fiber drums, dish packs, and cartons with a capacity of not less than five (5) cubic feet will be of a minimum bursting strength of four hundred (400) pounds per square inch. The sum of the interior horizontal and vertical girths will be not less than one hundred and seventy (170) inches for fiber drums, or other drum-type containers. Not more than one hundred and fifty (150) pounds of material will be packed therein and the containers shall be securely sealed. Corrugated containers may be used in lieu of drum-type containers.

#### 1.4. Filler and Padding

Good quality cellulose wadding, fiberboard, corrugated fiberboard, styrofoam, or kraft-type paper will be used as a filler or padding for general packing.

#### 1.5. Wrapping Paper

Wrapping paper will be kraft-type of not less than thirty (30) pound weight except as otherwise specified.

#### 1.6. Paper – Waxed or Treated

All waxed paper will be manila wax or equivalent of not less than thirty (30) pound weight. Treated paper will be of “butcher” paper type, free from creases and folds.

#### 1.7. Plastic Mattress Bags

Bags will be a minimum plastic thickness of five (5) millimeters.

### 2. General Packing Standards

2.1 The Contractor shall perform all preparation and packing in a manner requiring the least cubic measurement, producing packages that withstand normal movement without damage to the container or contents and at a minimum of weight. The Contractor shall take into consideration the mode of transport when preparing and packing the HG&E.

2.2 Snugly fit items to prevent shifting and label the cartons clearly with the Client's name, the room location, and a general description of contents. When closed, the carton's top or sides should neither bulge nor sag. Mark "unpack first" on cartons containing set-up items needed right away at destination.

- 2.3 Wrap all fragile or breakable items in tissue paper in such a manner that they are fully protected. Write "fragile" on the carton only if items are truly fragile.
- 2.4 After packing, cartons must be closed and either glued, stapled (provided specialized stapling machines are used), or sealed by taping lengthwise at the joint on top and bottom. Cartons will be stacked in an upright position so as to minimize crushing
- 2.5 The Contractor shall crate household goods and effects (HG&E) when deemed necessary. When a Client elects to have an item crated that the Contractor would not normally crate, it will be at the Client's expense.
- 2.6 Crates may be used in lieu of cartons when determined by the Contractor as being necessary to ensure protection, safe movement, and storage of related articles.
- 2.7 The Contractor shall protect all finished surfaces and edges to prevent scratching, denting or damaging.
- 2.8 Plastic mattress bags shall be a "one-time use only" item.
- 2.9 The use of the Client's tables or other similar flat surfaces to stage and pack materials is discouraged. When no other options are available the Client's property is to be carefully protected to prevent damage. Similarly, when heavy items, such as flat screen televisions, are being removed from their stand, care is to be taken not to damage the surface when lifting

### 3. HG&E Packed by Client

- 3.1 Any containers packed by the Client may be repacked by the Contractor. If the Contractor chooses not to repack a container, the Contractor will remain liable for the packed items. If the Client refuses to allow the Contractor to repack a container, the Contractor shall not be liable for the packed items. In this case, the Contractor is to annotate the inventory accordingly and have the Client initial the entry.

### 4. Specific Packing Standards

#### 4.1. Appliances

Small appliances shall be free of any liquids. Covers and openings shall be secured with masking tape. Wrap cords, handles, and other components separately and tape them to the appliance. Wrap the whole appliance in kraft-type paper.

#### 4.2. Beds/Mattresses

- a. Conventional Mattresses: Mattresses and box springs should be slid from the bed into a mattress carton or mattress bag, which is then taped tightly shut.
- b. Memory Foam Mattresses: Tempur-Pedic or comparable mattress(s) must be placed in a mattress carton which is taped tightly shut and shipped horizontally with nothing on top to compress the mattress.
- c. Waterbeds: The assembly and disassembly of waterbed frames is the Contractor's responsibility.

#### 4.3. Books

Special volumes shall be individually wrapped in tissue paper and packed on their edge. Valuable books (e.g. leather bound, family heirlooms, etc.) shall be wrapped separately in tissue paper with sufficient cushioning to prevent crushing or damage to the cover or bindings.

#### 4.4. Carpets, Rugs, Mats, and Underlay

Rugs and carpets shall be rolled. Carpets, rugs, and mats in excess of six (6) foot by six (6) foot shall be rolled separately in a rigid solid tight roll and tied or taped at approximately three (3) foot intervals. Underlay shall be either rolled and tied separately or rolled together with the rug and separated from the rug by sixty (60)

pound kraft –type paper. Where an underlay is in such deteriorated condition that it cannot be rolled, the condition shall be clearly identified on the inventory. Tape, when used, shall not be applied directly to the carpet, rug, mat or underlay.

#### 4.5. Glassware, Statuary, Figurines, Dishes and Glassware

These items are to be packed in a dish pack. First place a corrugated divider in the bottom then insert the cell layer. Heavier items like glasses (but not stemware) shall be packed on the bottom. Place corrugated dividers on top of each completed layer and continue for three layers. Glassware, statues and figurines are to be wrapped using a double thickness of kraft-type paper. Lay the item on its side, on the diagonal near centre of paper and bring the corner of the paper over it. Lay a second item on its side next to the first one and fold both sides of paper toward the centre and roll loosely together. Place package in a cell in the Dish pack.

#### 4.6. Chinaware, Crockery, Lamps, Clocks, Jardinières, Statuary, Vases, and Bric-a-brac

Each china carton, barrel, drum or specially designed fibre container shall be padded in the bottom with sufficient unprinted kraft-type paper, or other adequate cushion material. Items shall be wrapped separately, except groups of flat items which shall be properly divided, bundled and cushioned. Barrels, fibre drums, and other containers shall be packed as compactly as possible. Small bric-a-brac items should be appropriately and conspicuously marked in order to readily identify the wrapped item from wads of paper filler.

#### 4.7. Clothing

- a. Clothing articles which are stored in the home on hangers shall be hung in a wardrobe carton. Plastic garment bags shall be removed. Clothes are not to be jammed into the wardrobe carton. Tape all seams securely. Empty hangers are to be packed in a separate carton.
- b. Loose items shall not be placed in the bottom of wardrobe carton. Items such as umbrellas, guitars or other musical instruments, canes, and swords may be packed in a wardrobe carton so long as they are wrapped and properly secured.
- c. Folded clothes may be removed from drawers and packed neatly into appropriately sized cartons that have been lined at the bottom with kraft-type paper. All small, loose items in the drawers shall be wrapped and packed. Note: The Contractor may choose to leave articles in drawers if considered safe to do so.

#### 4.8. Crawl Spaces and Attics

The Contractor shall pack items located in the crawl spaces and attics only when the Client makes the items accessible and provides a safe area to perform the services.

#### 4.9. Cups

Cups are to be wrapped using a double thickness of kraft-type paper or tissue paper. Place the cup upside down with the handle to the right, near centre of paper. Wrap the corner of paper over the cup. Lay a second cup over the first, handle to the left and fold in the right and left corners. Roll and loosely wrap.

#### 4.10. Dried and Canned Food

The Contractor may ship dried goods and canned goods. Opened dried-good boxes are to be taped shut.

#### 4.11 Electronics

- a. The Contractor shall pack larger electronics components in the original shipping cartons if the Client makes them available. If not, they are to be wrapped and packed in an appropriately sized carton as outlined below.
- b. Computers: Computers shall be packed using static-free materials (Note: standard bubble wrap and packing peanuts are NOT static-free). Create a base layer of kraft-type paper and place the computer on top of layer. Then surround



the sides and the top with more wadded kraft-type paper until it is firmly packed. Seal the carton shut with packing tape. Follow the same steps for monitors, keyboards, and printers. All manuals, software, cables shall be packed in a separate carton.

- c. Video Cassette Recorder/CD/DVD/Blu Ray players: Layer the bottom of the carton with wadded kraft-type paper. Place the player on top of the kraft-type paper padding and continue to pad all the sides and the top of the player with wadded kraft-type paper until the carton is full. Seal it shut with packing tape. Pack the Video Cassette Recorder tapes and discs in separate small cartons suitable for books.
- d. Cathode Ray Tube TVs and similar typed computer monitors: Layer a cushion of crumpled kraft-type paper on the bottom and the top of the carton. Fill all empty spaces with crumpled paper until the sides of the carton are firm, but not bulging.
- e. LCD, LED, Plasma and next generation TVs and similar type computer monitors: Wrap the TV in moving blankets and secure it with packing tape. Place some filler in the bottom of the carton and carefully lower the TV into carton. Push down on it a little to make sure there is enough packing on the bottom of the carton. Place filler around the TV to secure the TV in the carton. Cords and remote controls shall be wrapped and placed in the filler on the top of the carton. Tape the carton shut and place "Fragile" stickers on every side of the carton

#### 4.12 Exercise equipment and child/infant cribs

- a. The Client is responsible to disassemble exercise equipment and child/infant cribs.
- b. All components are to be wrapped and placed in appropriately sized cartons.

#### 4.13 Firearms

Non-restricted firearms are to be shipped in accordance with the Criminal Code of Canada, the Federal Firearms Act and applicable Provincial regulations (<https://laws-lois.justice.gc.ca/eng/acts/f-11.6/>) The Contractor shall pack all firearms in the presence of the Client.

#### 4.14 Footwear

- a. Unboxed shoes shall be wrapped in pairs (separating mates with paper) with tissue or kraft-type paper and packed in a medium sized carton.
- b. Boxed shoes shall remain in the original packaging and be placed in a medium sized carton.

#### 4.15 Fragile Items

Artificial flowers and house plants shall be packed into the top layers of a dish pack. To make an appropriately sized cell, fold back the cell dividers, and make a nest of crumpled filler to support and suspend the base and to prevent shifting. Place the arrangement in the nest, supporting the sides and the top with crumpled filler.

#### 4.16 Garages (sheds) or patio area contents

The Contractor shall pack items located in the garage into cartons where appropriate. This includes small yard toys, sporting equipment, hiking boots, camping equipment, collapsible chairs, paddles, tricycles or other related items.

- a. Patio furniture: Chairs are to be stacked, nested and cushions placed in appropriately sized cartons. Glass topped tables are to be treated as per the mirror packing standard.
- b. Outdoor planters, watering containers, pots, and related items shall be wrapped and packed in appropriately sized cartons.

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#### 4.17 Garden Tools/Motorized Yard Equipment

- a. Long handled tools shall be bundled together with packing tape. Pad the bundles if necessary, to prevent damage to other items.
- b. Attachments shall be removed from power tools, wrapped and packed securely in an appropriately sized carton. Use kraft-type paper to fill the empty spaces.
- c. Wrap small hand tools separately or leave them in toolboxes, filling spaces with crumpled paper. Wrap loose tools and pack them in an appropriately sized carton with other tools.
- d. The Contractor shall ensure the Client has emptied the fuel from lawn mowers, powered hedgers, weed trimmers, or similar items of fuel and drained oil from all machines that are not closed systems such as motorcycles.

#### 4.18 Grandfather Clocks

Clock weights and pendulums shall be packed in a carton which is clearly annotated. The Contractor shall wear cotton gloves when handling the weights to prevent tarnishing. The clock cabinet shall be wrapped in moving blankets and crated appropriately.

#### 4.19 Kitchenware

All kitchenware shall be wrapped, packed and placed in cartons.

#### 4.20 Lamps

Line an appropriately sized carton or dish pack with tissue paper, leaving a sufficient amount hanging over the sides to cover the shade. Handling the shade by its wire frame, place it in the carton and cover it with tissue paper. Pack crumpled tissue paper around the sides and fold into the lining. Remove the light bulb and the lamp harp from the lamp base. Wrap all the components separately in kraft-type paper. Place the base upright, bottom first, along with the harp in an appropriately sized carton. Lampshades may be nested with the base if there is sufficient room, with the exception of silk lampshades which shall never be nested and shall be packed separately from all other items.

#### 4.21 Linen

Bedding or linens shall be folded and placed in cartons. Fine linens (silk, Irish linen, etc.) shall be wrapped in tissue paper before packing.

#### 4.22 Mirrors, Pictures, Paintings, Glass Tabletops, and Stone Tabletops

Mirrors, glass tabletops, large glass faced pictures, and all other glass articles of this type shall be wrapped and packed in a crate, or a carton which is specially designed and used by the moving industry for that purpose. Place masking tape diagonally across the glass to form an X. Do not let the tape touch any area of the item. Fold the corrugated cardboard inserts snugly along the top, bottom and sides. Let the side inserts project past the ends and bend them over the corners. Fit four carton sections firmly around the piece. Tape all the edges together securely. Pack only one mirror or picture per carton. Paintings without glass protection are to be packed in such a manner as to avoid contact with any material which could damage the surface of the painting. Stone tabletops shall be packed separately.

#### 4.23 Plates, saucers, bowls, and other similar items

These items are to be wrapped using a double thickness of kraft-type. Place a plate slightly beyond the centre of the paper stack. Fold the paper over the plate, leaving a good overlap. Place another plate on top of the first and bring the overlap back over the second plate. Before adding a third plate, pick up another double thickness of paper. Fold this along with the remaining overlap over third plate. Continue for the fourth and fifth plates. For small plates use four to six plates per package. Then pick up another double layer of paper, fold it over top. Fold in the right and left corners and loosely roll plates into compact package. Pack plates in the Dish pack on their edges.

#### 4.24 Pots, Pans and Cutlery

Pots, pans and baking trays are to be wrapped individually with smaller items nested into the larger ones. Wrap cutlery in bundles and place them in a dish pack.

#### 4.25 Silverware

Each item of silverware, silver ornamentation, or brass/copper will be completely wrapped in non-tarnish tissue paper. If there is a silver chest, place the wrapped flatware in it and pack the wrapped chest in appropriate size carton. Wrap larger serving pieces such as teapots in tissue paper or silver bags and place them into a dish pack.

#### 4.26 Stemware and other fragile items

These items are to be wrapped individually in tissue paper and placed only in top layer of Dish pack. A double thickness of tissue paper is folded into the glass and the item is loosely rolled. Place glasses in the Dish pack stem side up.

#### 4.27 Tables and Chairs

- a. Where possible table legs shall be removed, wrapped in padding and bundled. The bundle shall be taped together taking care not to allow the tape to touch the table legs. Ensure the hardware for the legs is re-attached to the bottom of the table.
- b. Wrap the tabletop with padding and tape it in place. All table leaves are to be removed, wrapped in padding and bundled.
- c. Wrap chairs in padding and tape in place taking care not to allow the tape to touch the furniture.

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## APPENDIX “4” – VANS/VEHICLES/CONTAINERS AND EQUIPMENT STANDARDS

The Contractor shall only use those vans, vehicles and containers suitable for the movement of household good and effects (HG&E).

The Contractor shall ensure that:

- 1.0 prime movers (tractors) and trailers (including trailers used to transport containers) and straight trucks shall be professionally inspected or certified by Provincial or Territorial authorities as required by their respective Highway or Traffic Act regulations and be equipped with suspension suitable for road transport of HG&E;
- 1.1 closed vans/vehicles/containers shall be in a good state of repair and be properly equipped. The interiors thereof will be clean, dry, and free from vermin, acid, paint, grease, and all other substances injurious to the HG&E. Each will be provided with a sufficient quantity of clean pads, covers, and other protective equipment to ensure safe delivery of the HG&E. Fittings and equipment (such as doors, floors, ramps, van walls, tie-down points, locking devices) shall be in a good state of repair and available in sufficient quantity to contain and secure the HG&E;
- 1.2 the unit shall be fully equipped with proper items in sufficient quantities to protect the HG&E and the origin and destination residence;
- 1.3 any unique material handling equipment shall be provided and used, especially for the safe handling of pianos, hot tubs, safes, etc.;
- 1.4 the use of intermodal containers is strictly prohibited;
- 1.5 to provide for secure protection of the contents of the vans/vehicles/containers/, only case-hardened locks shall be used; and
- 1.6 necessary precautions shall be taken to ensure that all conveyances are secured at all times throughout the HG&E and private motor vehicle (PMV) movement process.

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## APPENDIX “5” – SUBCONTRACTOR MANAGEMENT PLAN

When the Contractor relies on a subcontractor to provide services required by this SOA, it remains the responsibility of the Contractor to ensure that the services are provided on time, with no loss or damage and that their personnel are courteous, respectful and professional. Reviewing of invoices to ensure accuracy is also a key Contractor responsibility. To meet this aim, the Contractor is to provide a Subcontractor Management Plan that addresses the following:

- 1.0 a clearly defined process and guidelines to ensure that when a problem has been identified by a subcontractor it is addressed to the mutual satisfaction of all concerned at the lowest possible level of the organization;
- 1.1 the administrative and disciplinary (i.e. suspension) processes and steps shall be defined;
- 1.2 the standards to be maintained, the frequency of inspection and the reporting and corrective measure steps when the standard has not been met; and
- 1.3 claim settlement can become a significant irritant for a Client and be costly for the Contractor if disputed. Contractors are to identify the steps to reduce and eliminate disputes and expedite a settlement to reduce irritation to the Client.

**ANNEX “B” – BASIS OF PAYMENT - SCENARIOS**

The Bidder must complete and provide a detailed cost estimate for the following five (5) scenarios. These estimates must be in accordance with the prices offered through the price list provided in Annex “C” – Basis of Payment – Detailed price listing. Sample pricing must be in accordance with the terms and conditions outlined in this RFSO

**Failure to provide pricing for these scenarios in Annex “B” – Basis of Payment – Scenarios will result in the disqualification of your bid.**

The following five scenarios shall be used only for evaluation purposes.

<b><u>Pricing Scenario 1</u></b>	
Origin:	Victoria, British Columbia
Destination:	Ottawa, Ontario,
Weight:	6,000 kilograms
Declared Value insurance:	300,000.00
Packing and unpacking services required. (please estimate charges based on standard formula for a 3-bedroom house)	
Vehicle to be moved is a 2020 Ford Escape	
<b>Total Cost Estimate Pricing Scenario 1: \$ _____</b>	
<b>Please attach detailed estimate with your bid</b>	

<b><u>Pricing Scenario 2</u></b>	
Origin:	Ottawa, Ontario
Destination:	St. John’s, Newfoundland and Labrador
Weight:	8,500 kilograms
Declared Value insurance:	\$75,000.00
Packing and unpacking services required. (please estimate charges based on standard formula for a 4-bedroom house)	
This move includes 4 oil paintings (3ft x 5ft each)	
<b>Total Cost Estimate Pricing Scenario 2: \$ _____</b>	
<b>Please attach detailed estimate with your bid</b>	

<b><u>Pricing Scenario 3</u></b>	
Origin:	Yellowknife, Northwest Territories
Destination:	Ottawa, Ontario
Weight:	3,400 kilograms
Declared Value insurance:	\$250,000.00
Packing and unpacking services required. (please estimate charges based on standard formula for a 2-bedroom apartment)	
<b>Total Cost Estimate Pricing Scenario 3: \$ _____</b>	
<b>Please attach detailed estimate with your bid</b>	

<b><u>Pricing Scenario 4</u></b>	
Origin:	Saguenay, Québec
Destination:	Ottawa, Ontario
Weight:	6,800 kilograms
Declared Value insurance:	\$120,000.00
Packing and unpacking services required. (please estimate charges based on standard formula for a 3-bedroom house)	
This move includes moving a baby grand piano (apartment size).	
<b>Total Cost Estimate Pricing Scenario 4: \$ _____</b>	
<b>Please attach detailed estimate with your bid</b>	

<b><u>Pricing Scenario 5</u></b>	
Origin:	Ottawa, Ontario
Destination:	Vancouver, British Columbia
Weight:	9,500 kilograms
Declared Value insurance:	\$450,000.00
Packing and unpacking services required. (please estimate charges based on standard formula for a 5-bedroom house)	
Vehicle to be moved is a 2019 Audi Q7	
<b>Total Cost Estimate Pricing Scenario 5: \$ _____</b>	
<b>Please attach detailed estimate with your bid</b>	

Scenarios	Cost estimate pricing
1. Victoria - Ottawa	
2. Ottawa - St. John's	
3. Yellowknife - Ottawa	
4. Saguenay - Ottawa	
5. Ottawa – Vancouver	
<b>Total cost estimate pricing</b>	

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## ANNEX “C” – BASIS OF PAYMENT – DETAILED PRICE LISTING

The Bidder must provide their detailed price listing of all cost relevant to all moves. This price listing shall be used to determine the cost associated with each scenario in Annex “B” – Basis of Payment – Scenarios

**Failure to provide pricing in Annex “C” – Basis of Payment – Detailed Price Listing will result in the disqualification of your bid.**

This price listing can be attached as an annex to the bid submitted.



**ANNEX “D” – LANGUAGE PROFICIENCY**

Language Proficiency Grid Legend	Oral	Comprehension	Written
<b>Basic</b>	A person speaking at this level can: <ul style="list-style-type: none"> <li>• ask and answer simple questions;</li> <li>• give simple instructions; and</li> <li>• give uncomplicated directions relating to routine work situations.</li> </ul>	A person reading at this level can: <ul style="list-style-type: none"> <li>• fully understand very simple texts;</li> <li>• grasp the main idea of texts about familiar topics; and</li> <li>• read and understand elementary points of information such as dates, numbers, or names from relatively more complex texts to perform routine job-related tasks.</li> </ul>	A person writing at this level can: <ul style="list-style-type: none"> <li>• write isolated words, phrases, simple statements or questions on very familiar topics using words of time, place or person.</li> </ul>
<b>Intermediate</b>	A person speaking at this level can: <ul style="list-style-type: none"> <li>• sustain a conversation on concrete topics; report on actions taken;</li> <li>• give straightforward instructions to employees; and</li> <li>• provide factual descriptions and explanations.</li> </ul>	A person reading at this level can: <ul style="list-style-type: none"> <li>• grasp the main idea of most work-related texts;</li> <li>• identify specific details; and</li> <li>• distinguish main from subsidiary ideas.</li> </ul>	A person writing at this level can: <ul style="list-style-type: none"> <li>• deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary.</li> </ul>
<b>Advanced</b>	A person speaking at this level can: <ul style="list-style-type: none"> <li>• support opinions; and understand and express hypothetical and conditional ideas.</li> </ul>	A person reading at this level can: <ul style="list-style-type: none"> <li>• understand most complex details, inferences and fine points of meaning; and</li> <li>• have a good comprehension of specialized or less familiar material.</li> </ul>	A person writing at this level can: <ul style="list-style-type: none"> <li>• write texts where ideas are developed and presented in a coherent manner.</li> </ul>

## ANNEX "E" – DIRECT DEPOSIT FORM



FINANCES AND PROCUREMENT DIRECTORATE  
Supplier Creation &  
Direct Deposit Enrollment Form

*Protected once completed*  
For internal use only \_\_\_\_\_  
Supplier ID Code

**INSTITUTION AND ACTION REQUIRED - Please select:**

Create - Senate of Canada

Reason for action:  
\_\_\_\_\_

**Section 1 - SUPPLIER DETAILS**

LEGAL NAME: \_\_\_\_\_ Tel: \_\_\_\_\_

OPERATING NAME: \_\_\_\_\_ Tel: \_\_\_\_\_

**ADDRESS:**

Street No. /PO BOX: \_\_\_\_\_ Postal Code/Zip: \_\_\_\_\_

City: \_\_\_\_\_ Province / State: \_\_\_\_\_ Country: \_\_\_\_\_

**Remittance Address if different from above:**

Street No. /PO BOX: \_\_\_\_\_ Code Postal/Zip: \_\_\_\_\_

City: \_\_\_\_\_ Province / State: \_\_\_\_\_ Country: \_\_\_\_\_

HST/GST (If applicable Corporation) \_\_\_\_\_

Social Insurance Number (for Contractor) \_\_\_\_\_

**Section 2 - SUPPLIER PAYMENT DETAILS**

CANADIAN \$ |  OTHER CURRENCY \_\_\_\_\_ (By Cheque Only)

Method of Payment:

CHEQUE |  (CND \$) DIRECT DEPOSIT - Please Attach a blank "VOIDED" cheque or other related banking documents - *Recommended*

**Direct Deposit Email Payment Notification:**

EMAIL Address 1 \_\_\_\_\_

EMAIL Address 2 \_\_\_\_\_

**Section 3 - CONSENT**

I give consent to the Senate of Canada to pay the invoices for the supplier identified in Section 2 through Direct Deposit to the financial institution that I have designated through the attach cheque with "VOID" written on it or my other attached related banking documents.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

Please submit the completed and signed form (and attachment) to the Senate Procurement Division by e-mail at:

[Proc-Appr@sen.parl.gc.ca](mailto:Proc-Appr@sen.parl.gc.ca)

**ANNEX “F” – COVID FORM**

If required, three (3) business days prior to accessing any Senate of Canada building the following form must be completed and returned to [linda.sabourin@sen.parl.gc.ca](mailto:linda.sabourin@sen.parl.gc.ca) for approval.

Item	Checklist	Response
<b>1</b>	Client Name:	
<b>2</b>	Move Location:	
<b>3</b>	Contractor:	
<b>4</b>	Name of company:	
	Supervisor name and phone:	
	Name(s) of employees(s):	
	Brief description of work: The contractor has been briefed on the rules in place for the site they will be visiting (H&S Plan + required documents + Checklist in the email)	
<b>5</b>	What are the limited number of workers/sub-trades that need to be on-site each day?	
<b>6</b>	Is the contractor/consultant bringing in their own tools and materials?	
	Provide the plan for loading and unloading of materials and equipment.	
	Provide the plan on how vehicles will be disinfected and provide confirmation that the vehicles have been disinfected.	
	Provide the safety plan for tool sharing/ cleaning procedures.	
	Provide information on how waste will be removed from site (in covered containers/vehicles).	
<b>7</b>	Provide the health and safety plan (from the contractor).	
<b>8</b>	Confirm method to prove covid19 procedures are followed (eg: provide photos.) Additional confirmation: Are tools being properly cleaned? Are workers practicing physical distancing?	
<b>9</b>	Will the contractor be working alone/in isolation?	
	If unescorted by PPS, what measures are in place for the contractor to check in with their employer?	
<b>10</b>	Confirm that the contractor will provide their own disinfected wipes, cleaning items (i.e. HEPA filter on vacuum), and non-medical masks.	
<b>11</b>	Who is the contact person in the event of a presumptive or confirmed cases of Covid19?	

**ANNEX “G” – SERVICES EVALUATION FORM**

**SERVICES EVALUATION FORM – Moving Services**

Date/Time: \_\_\_\_\_

Senator’s Assistant / Senator’s Name: \_\_\_\_\_

Name of Moving Company: \_\_\_\_\_

We hope that your move was a success. Please take a few moments to provide us with feedback and send the completed form to Procurement ([Proc-Appr@sen.parl.gc.ca](mailto:Proc-Appr@sen.parl.gc.ca)).

1 = Poor; 2 = Fair; 3 = Good; 4 = Excellent; N/A = not applicable

Courtesy of moving staff	1	2	3	4	N/A
Efficiency of pre-move meeting	1	2	3	4	N/A
Overall quality of services	1	2	3	4	N/A

Y = Yes; N = No, N/A = not applicable

Were your instructions followed                    Y        N        N/A

Were the timelines kept                                Y        N        N/A

Based on your experience, what could the moving service company improve for future moving services?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Your Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Thank you for your feedback.

Client Signature and Date \_\_\_\_\_

This form will be shared with the Contractor