RETURN BIDS TO: 
Office of the Superintendent of Financial Institutions Canada
Procurement and Contracting
255 Albert Street, 12th floor
Ottawa, ON K1A 0H2
Email: Contracting@osfi-bsif.gc.ca

Bureau du surintendant des institutions financières Canada
Achats et contrats
255 rue Albert, 12e étage
Ottawa, Ontario, K1A 0H2
Courriel : contracting@osft-bsif.gc.ca

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

In the name of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

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

Proposal au : Bureau du surintendant des institutions financières Canada

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

En apposant ma signature ci-après, j’atteste, au nom du soumissionnaire, que j’ai lu la demande de propositions (DP) en entier, y compris les documents incorporés par renvoi dans la DP et que:

1. le soumissionnaire considère qu’il a les compétences et que ses produits sont en mesure de satisfaire les exigences obligatoires décrites dans la demande de soumissions;
2. cette soumission est valide pour la période exigée dans la demande de soumissions;
3. tous les renseignements figurant dans la soumission sont complètes, véridiques et exacts; et
4. si un contrat est attribué au soumissionnaire, ce dernier se conformera à toutes les modalités énoncées dans les clauses concernant le contrat subséquent et comprises dans la demande de soumissions.
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PART 1 - GENERAL INFORMATION

1.1 Summary

This bid solicitation is being issued to satisfy the requirement of the Office of the Superintendent of Financial Institutions (OSFI) for the provision of Professional Services. OSFI requires a contractor that specializes in the provision of Parliamentary appearance coaching services. It is intended to result in the award of one contract for one (1) year, plus four (4) irrevocable option(s), allowing Canada to extend the term of the contract by one (1) year each.

1.2 Security Requirements

1.2.1 Before award of a contract, the following conditions must be met:

(a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;

(b) the Bidder’s proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Part 6- Resulting Contract Clauses;

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

1.2.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

1.2.3 For additional information on security requirements, bidders should consult the “Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders” (http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31) document on the Departmental Standard Procurement Documents Website.

1.3 Statement of Work

The Work to be performed is detailed under Annex A – Statement of Work of the resulting contract clauses.

1.4 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within fifteen (15) working days from receipt of the results of the bid solicitation process. The debriefing will be in writing.
PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions


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

The 2003 (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 180 days

2.2 Submission of Bids

Bids must be submitted only to contracting@osfi-bsif.gc.ca by the date, time and place indicated on page 1 of the bid solicitation.

a. If your bid is transmitted by electronic mail, Canada will not be responsible for late bids received at destination after the closing date and time, even if it was submitted before.

b. Bids must NOT be sent directly to the Contracting Authority. Bids sent directly to the Contracting Authority will not be considered.

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

2.2.1 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least ten (10) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

2.3 Former Public Servant

Contracts awarded to public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below before contract award.

Definitions

For the purposes of this clause, “former public servant” is any former member of a department as defined in the Financial Administration Act, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

a. an individual;
b. an individual who has incorporated;
c. a partnership made of former public servants; or
d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c.C-17, the Defence Services Pension Continuation Act, 1970, c.D-3, the Royal Canadian Mounted Police Pension Continuation Act, 1970, c.R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c.R-11, the Members of Parliament
Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? Yes () No ()

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

a. name of former public servant;
b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder’s status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

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

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

2.5 Extension of Time

If additional time is required by the Bidder, the Contracting Authority may grant an extension at their sole discretion.

2.6 Applicable Laws

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

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

2.7 Bid Challenge and Recourse Mechanisms

a. Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.

b. Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada’s Buy and Sell website, under the heading “Bid Challenge and Recourse Mechanisms” contains information on potential complaint bodies such as:

1. Office of the Procurement Ombudsman (OPO)

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2. Canadian International Trade Tribunal (CITT)

c. Suppliers should note that there are strict deadlines for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.
PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

Section I: Technical Bid (1 soft copy via email)
Section II: Financial Bid (1 soft copy via email)
Section III: Certifications (1 soft copy via email)

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

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

a. use a numbering system that corresponds to the bid solicitation.

Canada’s Policy on Green Procurement: The policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process See the Policy on Green Procurement (http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html).

Submission of Only One Bid: Multiple bids from the same bidder are not permitted in response to this bid solicitation. Each bidder must submit only a single bid. If any bidder submits more than one bid, Canada will choose in its discretion which bid to consider.

Section I: Technical Bid

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

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

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

Substantiation of Technical Compliance: The technical bid must substantiate the compliance of the bidder and its products and services with the specific requirements of Attachment 1 to Part 4, which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the “Reference” column of Attachment 1 to Part 4, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

Personnel Security: Where there is a personnel security requirement, résumés should state the current level of personnel security held by the proposed individual(s) and their corresponding Canadian Industrial Security Directorate (CISD) file number(s).

Education: Where the education of a proposed individual will be evaluated, Canada will only consider academic credentials obtained from a recognized* Canadian university, college or high school, or the equivalent for credentials obtained outside Canada, as established by a recognized* Canadian academic credentials assessment service. (*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following Internet link: http://www.cicic.ca/2/home.canada.)

Attachment 1 to Part 4 - Technical Evaluation Criteria, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation, and article 6.8, Payment, of Part 6 of the bid solicitation.

All Costs to be Included: The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option years. The identification of all necessary
equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.

Blank Prices: Bidders are requested to insert “$0.00” for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price blank, Canada will treat the price as “$0.00” for evaluation purposes and may request that the Bidder confirm that the price is, in fact, $0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is $0.00 will be declared non-responsive.

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.

3.2 Accessibility Standards

In accordance with the Treasury Board Contracting Policy and the Accessible Canada Act, federal departments and agencies must consider accessibility criteria and features when procuring goods or services. Therefore, bidders are encouraged to highlight all the accessibility features and components of their proposal for this requirement and must:

a. demonstrate how the proposed goods and/or services meet the accessibility requirement at delivery; or
b. describe how it would deliver the proposed goods and/or services under any resulting contract in a way that satisfies the mandatory requirements of the Accessible Canada Act.
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

a. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

b. An evaluation team composed of representatives of Canada will evaluate the bids.

c. Extension of Time: If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

d. Requests for Clarifications: If Canada 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 Canada. Failure to meet this deadline will result in the bid being declared non-responsive.

e. Requests for Interviews: If Canada wishes to interview the Bidder and/or any or all of the resources proposed by the Bidder to fulfill the requirements of the bid solicitation, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) following notice by the Contracting Authority to make any necessary arrangements (at the Bidder’s sole cost) for the interview to take place at a location specified by Canada.

f. Requests for Further Information: If Canada requires additional information in order to do any of the following pursuant to the Section entitled “Conduct of Evaluation” in 2003, Standard Instructions - Goods or Services - Competitive Requirements:

1. verify any or all information provided by the Bidder in its bid; or
2. contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,

The Bidder must provide the information requested by Canada within two (2) working days of a request by the Contracting Authority.

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria
Refer to Attachment 1 to Part 4: Technical Evaluation Criteria.

4.1.1.2 Point Rated Technical Criteria
Refer to Attachment 1 to Part 4: Technical Evaluation Criteria.

Point-rated technical criteria not addressed will be given a score of zero.

4.1.1.3 Reference Checks

If a reference check is performed, Canada will conduct the reference check in writing by e-mail. The Contracting Authority will send all email reference check requests to contacts supplied by the Bidder within a 48-hour period using the email address provided in the bid. Canada will not award any points unless the response is received within 5 working days of the date that Canada's email was sent.

If Canada does not receive a response from the contact person within the 5 working days, Canada will not contact the Bidder and will not permit the substitution of an alternate contact person.

Wherever information provided by a reference differs from the information supplied by the Bidder, the information supplied by the reference will be the information evaluated.

Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm’s length with the Bidder.

4.1.2 Financial Evaluation

Calculation of Financial Score:

a. A financial evaluation will be performed only on proposals that are technically responsive. A technically responsive proposal (i.e. Qualified Bidder) is a proposal that
meets all mandatory criteria and obtains the required minimum pass mark specified in this solicitation for the criteria that are subject to point rating.

b. Should there be an error in the extended pricing of the Bidder’s proposal, the unit pricing and rates shall prevail and the extended pricing shall be corrected in the evaluation. Any errors in quantities of the Bidder’s proposal shall be changed to reflect the quantities stated in the Request for Proposal (RFP).

c. The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, DDP Destination, Canadian customs duties and excise taxes included.

d. The Financial Proposal Pricing Tables provided in Attachment 2 to Part 4 will be used for the purposes of the financial evaluation. A missing firm price will render the Proposal non-responsive. Bidders must propose firm pricing as set out in the Pricing Tables as follows:

1. A firm all-inclusive price per Parliamentary appearance coaching session for each contract period, including option periods, as proposed by the Bidder in its Technical Bid.

e. Each Bidder’s proposed pricing will be evaluated and a “Total Evaluated Price” calculated as follows:

1. Pricing Table –

   A. The Bidder’s “Extended Price” will be computed for each of the contract periods, including option periods, using the Firm Price proposed by the Bidder (in column “B”) using the following formula:

   Estimated number of sessions per year (in column “A”) x Bidder’s Proposed All-inclusive Firm price per coaching session (in column “B”) = Extended Price

   B. The Bidder’s “Total Evaluated Price” will be determined by totaling the Bidder’s “Extended Price” (in column “C”) for each of the five (5) contract periods, including option periods.

2. The qualified Bidder with the lowest “Total Evaluated Price” will receive the maximum Financial Proposal Score of 30 points. The Financial Proposal Score for all other technically responsive Bidders will be computed (i.e. prorated) against the lowest “Total Evaluated Price” using the following formula:

   Financial Proposal Score = \[
   \frac{\text{Lowest Bidder “Total Evaluated Price”}}{\text{Other Bidder “Total Evaluated Price”}} \times 30 \text{ points}
   \]

4.2 Basis of Selection - Highest Combined Rating of Technical Merit and Price

a. To be declared responsive, a bid must:

   1. comply with all the requirements of the bid solicitation;
   2. meet all mandatory criteria; and
   3. obtain the required minimum points for the technical evaluation criteria which are subject to point rating

b. Bids not meeting (1) and (2) and (3) will be declared non-responsive.

c. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

d. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained ÷ maximum number of points available multiplied by the ratio of 70%.

e. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

f. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

g. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. Where two or more
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proposals achieve the identical highest combined rating of technical merit and price, the proposal with the highest technical score will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is $45,000 (45).

| Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%) |
|--------------------------------------------------|------------------|------------------|------------------|
| Overall Technical Score                         | Bidder 1         | Bidder 2         | Bidder 3         |
| 115/135                                          | 89/135           | 92/135           |
| Bid Evaluated Price                              | $55,000.00       | $50,000.00       | $45,000.00       |
| Calculations                                    | Technical Merit Score |
| | 115/135 x 70 = 59.62                             | 89/135 x 70 = 46.15 |
| | 92/135 x 70 = 47.70                              |                  |
| Pricing Score                                    | 45/55 x 30 = 24.54 | 45/50 x 30 = 27  | 45/45 x 30 = 30  |
| Combined Rating                                  | 84.16            | 73.15            | 77.70            |
| Overall Rating                                   | 1st              | 3rd              | 2nd              |
ATTACHMENT 1 to PART 4 – TECHNICAL EVALUATION

Mandatory Technical Criteria (M)

Proposals will be evaluated in accordance with the mandatory evaluation criteria as detailed herein. Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory evaluation criteria will be excluded from further consideration. Only proposals found to meet the mandatory evaluation criteria will be evaluated in accordance with the evaluation criteria subject to point rating.

Bidders must propose either one bilingual resource or one English resource and one French resource, in which case the two resources must each meet all of the mandatory criteria and obtain the required minimum points for the technical evaluation criteria which are subject to point rating.

<table>
<thead>
<tr>
<th>Mandatory Requirements</th>
<th>Reference</th>
<th>Complies (Yes/No)</th>
</tr>
</thead>
<tbody>
<tr>
<td>M.1</td>
<td>The Bidder’s proposed resource must have delivered a minimum of four (4) Parliamentary appearance coaching sessions within the last five (5) years, as of the issuance date of this RFP. The Bidder must provide references (including client names and contact information) for each coaching session. The references must come from at least two (2) separate clients. At least one of the references for the Parliamentary appearance coaching sessions must be for a group session and at least one must be for an individual session. Bidders must provide the following details as to how the stated training experience was obtained: 1. The client name(s); 2. The start and end dates of the assignment(s); 3. Details about the work performed by the bidder on coaching sessions including tasks, deliverables, and the project team involved.</td>
<td></td>
</tr>
<tr>
<td>M.2</td>
<td>The Bidder’s proposed resource must demonstrate a minimum of five (5) cumulative years of experience within the last eight (8) years, as of the issuance date of this RFP, in the delivery of Parliamentary appearance coaching sessions.</td>
<td></td>
</tr>
<tr>
<td>M.3</td>
<td>The Bidder’s proposed resource must submit two (2) samples of outlines for Parliamentary coaching sessions. Samples will be evaluated under Point-Rated Technical Criteria R1. One outline must be for a group Parliamentary appearance coaching session and one outline must be for an individual Parliamentary appearance coaching session.</td>
<td></td>
</tr>
</tbody>
</table>
Point Rated Technical Criteria (R)

Proposals that meet all of the mandatory requirements will be further evaluated against the following rated requirements.

The Bidder should demonstrate experience and qualifications with each one of the following requirements, some of which use information provided for Mandatory requirements. The experience demonstrated will be evaluated and scored in accordance with specific evaluation criteria detailed hereafter.

Proposals which do not achieve the minimum pass marks stated in the tables will be deemed non-compliant and will not be considered further. NOTE that there are individual pass marks for some criteria, and these must be achieved or exceeded in each case. If any individual pass mark is not achieved, the proposal will be considered non-compliant and will receive no further consideration.

Each requirement will be assessed using the criteria stated in the tables.

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Experience and Expertise</th>
<th>Reference</th>
<th>Maximum points available</th>
</tr>
</thead>
</table>
| R.1                 | Using the samples submitted in M.3, OSFI will assign a maximum of 20 points based on the rating scheme below:  
                          20 points – Good: materials are very clear and well-structured;  
                          10 points – Acceptable: materials demonstrate a moderate level of clarity and some structure;  
                          0 points: Unacceptable: Materials are not deemed acceptable.  
                          Up to a maximum of 20 points per sample. Minimum pass mark of 10 points per sample. |           | 40          |
| R.3                 | The Bidder’s proposed resource should have worked in proximity to Parliament, its operations or business in one or more of the following capacities:  
                          - Working on staff for a Member of Parliament (or Senator) at the federal, provincial or territorial level;  
                          - Working for a Member of a provincial Parliament; or  
                          - Working for a Parliamentary Committee at the federal, provincial or territorial level.  
                          Five (5) points if the proposed resource has experience listed above. |           | 5           |
| R.4                 | The Bidder’s proposed resource should have experience providing Parliamentary appearance coaching sessions to employees working within the financial sector.  
                          Five (5) points for each coaching session, up to a maximum of 15 points. |           | 15          |
| R.5                 | The Bidder’s proposed resource should have experience in conducting and taping Parliamentary training or coaching sessions using A/V equipment such as, but not limited to, HD video camera, projector, professional lighting and audio.  
                          Five (5) points for each session, up to a maximum of 15 points.  
                          Minimum pass mark of 5 points. |           | 15          |
| R.6                 | The Bidder’s proposed resource should have additional experience providing Parliamentary coaching sessions to senior management at the Assistant Deputy Minister level or above, in addition to the four (4) coaching sessions required under M1.  
                          Five (5) points under each coaching session, up to a maximum of 20 points. |           | 20          |
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>R.7</strong></td>
<td><strong>One of the Bidder’s proposed resource(s) should have experience delivering Parliamentary coaching sessions in French.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Five (5) points for each coaching session, up to a maximum of 20 points as follows:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Individual Parliamentary coaching sessions in French: maximum 10 points</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Group Parliamentary coaching sessions in French: maximum 10 points</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Minimum pass mark of 10 points.</strong></td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL (Minimum pass mark is 65 out of 115 points)</strong></td>
</tr>
<tr>
<td></td>
<td><strong>20</strong></td>
</tr>
<tr>
<td></td>
<td><strong>115</strong></td>
</tr>
</tbody>
</table>
ATTACHMENT 2 to PART 4 - PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed.

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

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

<table>
<thead>
<tr>
<th>Service</th>
<th>(A) Estimated number of sessions per year</th>
<th>(B) All-inclusive Firm Rate per session ($CAD)</th>
<th>(C = A x B) Extended Price ($CAD)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial Contract Period (Contract Award to March 31, 2023)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual session (one-on-one)</td>
<td>15</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Small Group Session (two to four participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Large Group Session (five to 10 participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Refresher session (one-on-one)</td>
<td>10</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>Option Period #1 (April 1, 2023 to March 31, 2024)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual session (one-on-one)</td>
<td>15</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Small Group Session (two to four participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Large Group Session (five to 10 participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Refresher session (one-on-one)</td>
<td>10</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>Option Period #2 (April 1, 2024 to March 31, 2025)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual session (one-on-one)</td>
<td>15</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Small Group Session (two to four participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Large Group Session (five to 10 participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Refresher session (one-on-one)</td>
<td>10</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>Option Period #3 (April 1, 2025 to March 31, 2026)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual session (one-on-one)</td>
<td>15</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Small Group Session (two to four participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Large Group Session (five to 10 participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Refresher session (one-on-one)</td>
<td>10</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>Option Period #4 (April 1, 2026 to March 31, 2027)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual session (one-on-one)</td>
<td>15</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Small Group Session (two to four participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Large Group Session (five to 10 participants)</td>
<td>5</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Refresher session (one-on-one)</td>
<td>10</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL EVALUATED PRICE</strong></td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>(sum of: Initial Period + Option 1 + Option 2 + Option 3 + Option 4)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Ineligibility and Suspension Policy (http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

5.1.2 COVID-19 Vaccination Requirement Certification

In accordance with the COVID-19 Vaccination Policy for Supplier Personnel, all Bidders must provide with their bid, the COVID-19 Vaccination Requirement Certification attached to this bid solicitation, to be given further consideration in this procurement process. This Certification incorporated into the bid solicitation on its closing date is incorporated into, and forms a binding part of any resulting Contract.

5.2 Certifications and Information Required Precedent to Contract Award

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information within the time frame specified will render the bid non-responsive.

5.2.1 Status and Availability of Resources

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

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

5.2.2 Education and Experience

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

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.
ATTACHMENT 1 to PART 5 – COVID-19 VACCINATION REQUIREMENT CERTIFICATION

I, __________________________________________ (first and last name), as the representative of __________________________________________ (name of business) pursuant to __________________________________________ (insert solicitation number), warrant and certify that all personnel that __________________________________________ (name of business) will provide on the resulting Contract who access federal government workplaces where they may come into contact with public servants will be:

a. fully vaccinated against COVID-19 with Health Canada-approved COVID-19 vaccine(s); or
b. for personnel that are unable to be vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the Canadian Human Rights Act, subject to accommodation and mitigation measures that have been presented to and approved by Canada;

until such time that Canada indicates that the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel are no longer in effect.

I certify that all personnel provided by __________________________________________ (name of business) have been notified of the vaccination requirements of the Government of Canada’s COVID-19 Vaccination Policy for Supplier Personnel, and that the __________________________________________ (name of business) has certified to their compliance with this requirement.

I certify that the information provided is true as of the date indicated below and will continue to be true for the duration of the Contract. I understand that the certifications provided to Canada are subject to verification at all times. I also understand that Canada will declare a contractor in default, if a certification is found to be untrue, whether made knowingly or unknowingly, during the bid or contract period. Canada reserves the right to ask for additional information to verify the certifications. Failure to comply with any request or requirement imposed by Canada will constitute a default under the Contract.

Signature: __________________________________________
Date: __________________________________________

Optional
For data purposes only, initial below if your business already has its own mandatory vaccination policy or requirements for employees in place. Initialling below is not a substitute for completing the mandatory certification above.

Initials: __________________________________________

Information you provide on this Certification Form and in accordance with the Government of Canada’s COVID-19 Vaccination Policy for Supplier Personnel will be protected, used, stored and disclosed in accordance with the Privacy Act. Please note that you have a right to access and correct any information on your file, and you have a right to file a complaint with the Office of the Privacy Commissioner regarding the handling of your personal information. These rights also apply to all individuals who are deemed to be personnel for the purpose for the Contract and who require access to federal government workplaces where they may come into contact with public servants.

PART 6 - RESULTING CONTRACT CLAUSES
The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

6.1 Interpretation

In the Contract, unless the context otherwise requires:

"Applicable Taxes" means the Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by Canada such as, the Quebec Sales Tax (QST) as of April 1, 2013;

"Articles of Agreement" means the clauses and conditions incorporated in full text or incorporated by reference from the Standard Acquisition Clauses and Conditions Manual to form the body of the Contract; it does not include the general conditions, any supplemental general conditions, annexes, the Contractor's bid or any other document;

"Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Minister of Finance and any other person duly authorized to act on behalf of that minister;

"Contract" means the Articles of Agreement, the general conditions, any supplemental general conditions, annexes and any other document specified or referred to as forming part of the Contract, all as amended by agreement of the Parties from time to time;

"Contracting Authority" means the person designated by that title in the Contract, or by notice to the Contractor, to act as Canada's representative to manage the Contract;

"Contractor" means the person, entity or entities named in the Contract to supply goods, services or both to Canada;

"Contract Price" means the amount stated in the Contract to be payable to the Contractor for the Work, exclusive of Goods and Services Tax and Harmonized Sales Tax;

"Cost" means cost determined according to Contract Cost Principles 1031-2 as revised to the date of the bid solicitation or, if there was no bid solicitation, the date of the Contract;

"Government Property" means anything supplied to the Contractor by or on behalf of Canada for the purposes of performing the Contract and anything acquired by the Contractor in any manner in connection with the Work, the cost of which is paid by Canada under the Contract;

"Party" means Canada, the Contractor, or any other signatory to the Contract and "Parties" means all of them;

"Work" means all the activities, services, goods, equipment, matters and things required to be done, delivered or performed by the Contractor under the Contract.

6.2 Security Requirement

6.2.1 The following security requirement (SRCL and related clauses) applies and forms part of the Contract.

- Contractor personnel requiring access to PROTECTED information, assets or work site(s) of Her Majesty must each hold a valid personnel security screening at the requisite level of Reliability Status or higher, granted or approved either by Canadian Industrial Security Directorate (CISD), PWGSC or by Departmental Security Officer (DSO) / delegated security authority for the Office of the Superintendent of Financial Institutions (OSFI). This screening must be maintained at all times during the performance of the Contract/Standing Offer.
- The Contractor MUST NOT remove any PROTECTED information from OSFI premises, and must ensure that its personnel are made aware of and comply with this restriction.
- Contractor personnel MUST use OSFI IT equipment for processing, storing and sending/receiving electronic Protected information, and that its personnel are made aware of and comply with this restriction.
- The Contractor MUST NOT utilize its Information Technology (IT) systems to electronically process, produce or store PROTECTED information, at any time, as part of this contract.

Definitions:
Protected information refers to specific provisions of the Access to Information Act and the Privacy Act and applies to sensitive personal, private, and business information. (Source: Treasury Board of Canada Secretariat).
6.3 Statement of Work

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

6.4 Standard Clauses and Conditions


6.4.1 General Conditions

2035 (2021-12-02), General Conditions - Professional Services (Higher Complexity) apply to and form part of the Contract.

6.4.2 Supplemental General Conditions

4008 (2008-12-12), Personal Information.

6.4.3 Resource Certifications

Employee(s) or subcontractor(s) of the Contractor must complete and sign the certifications attached at Annex G before they begin the Work or access information connected to the Work.

6.4.4 Annexes

All Annexes apply to and form part of the Contract.

6.5 Term of Contract

6.5.1 Period of the Contract

The period of the Contract is from contract award date to March 31, 2023.

6.5.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one-year periods under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

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

6.5.3 Termination on Thirty Days Notice

Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.

In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

6.6 Authorities

6.6.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Aleksandra Green
Title: Senior Contracting Officer
The Office of the Superintendent of Financial Institutions
Address: 255 Albert Street, Ottawa, ON K1A 0H2
E-mail address: contracting@osfi-bsif.gc.ca

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

6.6.2 Project Authority [To be inserted at contract award]
The Project Authority for the Contract is:

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

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

6.6.3 Contractor's Representative [To be inserted at contract award]

Name: ____________
Title: ____________
Telephone: ____________
Facsimile: ____________
E-mail address: ____________

6.7 Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

6.8 Payment

6.8.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of $ ________ [To be inserted at contract award]. Customs duties are included and Applicable Taxes are extra.

6.8.2 Limitation of Expenditure

Canada’s total liability to the Contractor under the Contract must not exceed $ ________ [To be inserted at contract award]. Customs duties are included and Applicable Taxes are extra.

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

1. when it is 75 percent committed, or
2. four (4) months before the contract expiry date, or
3. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.

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

6.8.3 Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal, private vehicle and incidental expense allowances specified in Appendices B, C and D of the National Joint Council Travel Directive (http://www.njc-cmn.gc.ca/directive/travel-voyage/index-eng.php), and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”.

All travel must have the prior authorization of the Project Authority.
All payments are subject to government audit.

Estimated Cost: $_______ (to be inserted at contract award)

6.8.4 Method of Payment – Monthly Payment


6.8.5 Time Verification

Time charged and the accuracy of the Contractor’s time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contract must repay any overpayment, at Canada’s request.

6.8.6 SACC Manual Clauses

SACC Manual clause A9117C (2007-11-30) T1204 - Direct Request by Customer Department

6.9 Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

6.9.1 Invoices must be distributed to the following email addresses for certification and payment: [To be inserted at contract award]

Each invoice must be supported by:

a) a copy of time sheets to support the time claimed;

b) original copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses.

6.10 Certifications

6.10.1 Compliance

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing additional information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the additional information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

6.11 Applicable Laws

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

6.12 Priority of Documents

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

a. the Articles of Agreement;

b. 2035 (2021-12-02), General Conditions - Professional Services (Higher Complexity);

c. Annex A, Statement of Work;

d. Annex B, Basis of Payment;

e. Annex C, Security Requirements Check List;

f. Annex D, Resource Certifications;

g. Annex E, Persons on Contract – Responsibility for Insurance

h. Annex F, Direct Deposit Enrolment Form for Businesses;

i. the Contractor’s bid dated (insert date of bid) (if the bid was clarified or amended, insert at the time of contract award: “", as clarified on ________’’ or ‘’, as amended on_______’’ and insert date(s) of clarification(s) or amendment(s) )

6.13 Joint Venture Contractor

a. The Contractor confirms that the name of the joint venture is _____ and that it is comprised of the following members:

(all the joint venture members named in the Contractor’s original bid will be listed)
b. With respect to the relationship among the members of the joint venture Contractor, each member agrees, represents and warrants (as applicable) that:

1. The Contractor has been appointed as the “representative member” of the joint venture Contractor and has full authority to act as agent for each member regarding all matters relating to the Contract;
2. by giving notice to the representative member, Canada will be considered to have given notice to all the members of the joint venture Contractor; and
3. all payments made by Canada to the representative member will act as a release by all the members.

c. All the members agree that Canada may terminate the Contract in its discretion if there is a dispute among the members that, in Canada’s opinion, affects the performance of the Work in any way.

d. All the members are jointly and severally or solidarily liable for the performance of the entire Contract.

e. The Contractor acknowledges that any change in the membership of the joint venture (i.e., a change in the number of members or the substitution of another legal entity for an existing member) constitutes an assignment and is subject to the assignment provisions of the General Conditions.

f. The Contractor acknowledges that all security and controlled goods requirements in the Contract, if any, apply to each member of the joint venture Contractor.

6.14 Professional Services – General

a. The Contractor must provide professional services on request as specified in this contract. Where in the Contract a specific individual is identified as required to perform the Work, the Contractor must make such person available to perform the work within 10 working days of the issuance of the Contract. Where such a specific individual is unavailable to perform the Work, Canada may elect to either (i) exercise its rights or remedies under the Contract or at law (including terminating the Contract for default), or (ii) Canada may require the Contractor to propose the replacement of the specific individual. This obligation applies despite any changes that Canada may have made to any hardware, software or any other aspect of the Identified User’s operating environment.

b. If there must be a change in a resource performing work under the Contract the Contractor must make the replacement available for work within 10 working days of the departure of the existing resource (or, if Canada has requested the replacement, within 15 working days of Canada’s notice of the requirement for a replacement).

c. All resources provided by the Contractor must meet the qualifications described in the Contract (including those relating to previous experience, professional designation, education, and language proficiency) and must be competent to provide the required services by any delivery dates described in the Contract. The resource must be approved by Canada prior to the replacement at the Work site.

d. The Contractor must monitor its employees to ensure satisfactory performance and that progress of the Work is maintained to Canada’s satisfaction. A Contractor representative will meet with the Project Authority on a regular basis (as specified by Canada) to discuss the performance of its resources and to resolve any issues at hand.

e. If the Contractor fails to meet any of its obligations under this Article, or fails to deliver any deliverable or complete any task described in the Contract on time, in addition to any other rights or remedies available to Canada under the Contract or the law, Canada may notify the Contractor of the deficiency, in which case the Contractor must submit a written plan to the Project Authority within 10 working days detailing the actions that the Contractor will undertake to remedy the deficiency. The Contractor must prepare and implement the plan at its own expense.

6.15 Safeguarding Electronic Media

a. Before using them on Canada’s equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.

b. If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately re-place it at its own expense.
6.16 Representations and Warranties

The Contractor made statements regarding its and its proposed resources experience and expertise in its bid that resulted in the award of the Contract. The Contractor represents and warrants that all those statements are true and acknowledges that Canada relied on those statements in awarding the Contract.

The Contractor also represents and warrants that it has, and all its resources and subcontractors that perform the Work have, the skills, qualifications, expertise and experience necessary to perform and manage the Work in accordance with the Contract, and that the Contractor (and any resources or subcontractors it uses) has previously performed similar services for other customers.

6.17 Confidentiality of Information

a. The Contractor must keep confidential all information provided to the Contractor by or on behalf of Canada in connection with the Work and all information conceived, developed or produced by the Contractor as part of the Work. Information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and remains the property of Canada.

b. Subject to the Access to Information Act, R.S.C. 1985, c. A-1, and to any right of Canada under the Contract to release or disclose, Canada agrees not to release or disclose outside the Government of Canada any information delivered to Canada under the Contract that is proprietary to the Contractor or a subcontractor.

c. The obligations of the Parties set out in this section do not apply to any information where the same information:

1. is publicly available from a source other than the other Party; or

2. is or becomes known to a Party from a source other than the other Party, except any source that is known to be under an obligation to the other Party not to disclose the information,

or

3. is developed by a Party without use of the information of the other Party

6.18 Dispute Resolution Services

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

6.19 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1(1) of the Department of Public Works and Government Services Act will review a complaint filed by the Contractor respecting administration of this contract if the requirements of Subsection 22.2(1) of the Department of Public Works and Government Services Act and Section 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.
ANNEX A – STATEMENT OF WORK

1. Title
Coaching for Parliamentary Appearances

2. Introduction
The Office of the Superintendent of Financial Institutions (OSFI) is the primary regulator of federally chartered financial institutions and federally administered pension plans. OSFI’s mission is to protect the rights and interests of depositors, policyholders, pension plan members and creditors of financial institutions, and to advance and administer a regulatory framework that contributes to public confidence in a competitive financial system. OSFI supervises and regulates all banks, and all federally incorporated or registered trust and loan companies, insurance companies, cooperative credit associations, fraternal benefit societies and pension plans.

Detailed information about the Office of the Superintendent of Financial Institutions (OSFI), including our mission and objectives, history, organization and how we regulate can be found at OSFI’s website www.osfi-bsif.gc.ca.

3. Objective
OSFI Executives and employees are sometimes called to appear before parliament to answer questions on their areas of expertise (including but not limited to, reinsurance, mortgage insurance, OSFI supervisory and capital frameworks, and Basel III implementation). The OSFI Communications and Engagement (C&E) Division requires a contractor to deliver parliamentary appearance coaching to OSFI executives and employees on an as-needed basis.

The objective of the coaching sessions is to upgrade and sharpen OSFI employees’ parliamentary appearance skills so they can deliver messages in comfort and with confidence.

4. Scope of Work
The contractor must develop and carry out full day (7 hours) and half-day (3.5 hours) customized parliamentary appearance coaching sessions in English and French, as well as (1 hour) refresher sessions, at OSFI Ottawa and Toronto offices (coaching may also occur at OSFI’s Montreal and Vancouver offices).

The C&E Division will coordinate the coaching sessions to be developed and delivered by the contractor. The coaching sessions must be customized to each participant’s needs and could be in person or virtual.

Before the end of each session, feedback must be provided to each participant about their performance in simulations and ideas for improving the effectiveness of an appearance before parliament. In the case of large and medium groups, in the interest of time, written assessments of approximately 150 words must be provided to the participants after the session.

The C&E Division will provide required material to the contractor to assist in the preparation of the coaching sessions.

5. Tasks and Deliverables
The contractor must provide the following deliverables:

Before the coaching sessions:

- A summary of the major political parties’ positions on matters concerning the financial sector, including on:
  - The overall stability of, and public confidence in, the financial system;
  - Housing affordability and sustainability, including mortgage qualification standards and mortgage insurance;
  - Private pension plan solvency and sustainability.
- Related to the above, sample questions that encapsulate/are informed by each party’s stance and interests.
- Provide a Self-assessment questionnaire, three working days in advance of each coaching session, to be sent to the Project Authority, completed by the participant and returned to the contractor before their respective sessions.
- The Self-assessment questionnaire will be to self-assess employee’s parliamentary appearance experience, and identify strengths, weaknesses and learning objectives. The contractor must use the gathered information to adapt the coaching sessions to the participants’ particular requirements, as outlined in the Scope of Work.
• The contractor must review the parliamentary appearance material to prepare for the coaching session. The contractor must follow up with the OSFI Communications and Engagement Division to ensure that they are clear as to the breakdown of the session and the materials they need to bring.
• Agenda, three working days in advance of each coaching session.
• Training material for participants in both English and French (as required) in electronic format two working days before the sessions to be reviewed by the Project Authority.

During the coaching sessions:

• The contractor must conduct and tape parliamentary appearance simulations, as well as provide constructive feedback to the participant. No images, video or materiel will be retained after the simulations.
• The contractor must also provide detailed written feedback on the participants’ abilities to the C&E Division.
• Deliver coaching sessions in either English or French, as required.
• A/V equipment. The contractor must come fully equipped with laptop computer, projector, HD video camera, professional lighting and audio.
• Feedback, as described in Scope of Work, to each participant at the end of the sessions.

After the coaching sessions:

• Final detailed report, outlining strengths, weaknesses and areas of improvements of each participant. The report must be provided to the Project Authority within fifteen (15) working days following the coaching session.
• Evaluation forms for participants to evaluate the sessions.

The contractor must also provide the following session options for coaching delivery:

• Individual Sessions (one on one). These sessions must be 3.5 hours with verbal feedback given directly to the participant in the session.
• Small group sessions (2 to 4 participants). These sessions must be 3 hours with the remaining half hour used to prepare written feedback.
• Large group sessions (5 to 10 participants). These sessions must be 6.5 hours with the remaining half hour used to prepare written feedback.
• Refresher sessions (one on one). These sessions must be one hour with verbal feedback given directly to the participant in the session.

6. Languages Requirements

The contractor must provide coaching sessions in English and in French.

7. Method of acceptance

Deliverables will be considered complete upon completion of the coaching sessions and upon approval and acceptance by the Project Authority.
ANNEX B – BASIS OF PAYMENT

[To be inserted at contract award]
## ANNEX C – SECURITY REQUIREMENTS CHECK LIST

<table>
<thead>
<tr>
<th>PART A: CONTRACT INFORMATION</th>
<th>PART B: EXISTING CONTRACTS</th>
<th>PART C: INFORMATION TECHNOLOGY REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

### SECURITY REQUIREMENTS CHECK LIST (SRL)

- **Annex A:**
  - **Government of Canada**
  - **Dipped on a message to the viewing commente dans l'expédition deudit**

- **Annex B:**
  - **NATO/OTAN**
  - **Foreign/étranger**

- **Annex C:**
  - **Restricted to (Limita):**
    - Canada
    - Restricted to (Limita):
      - NATO/OTAN countries
      - Restricted to (Limita):

- **Level of Information/Type of Information**:
  - **NATO UNCLASSIFIED**
  - **NATO NON CLASSIFIED**
  - **NATO CONFIDENTIAL**
  - **NATO SECRET**
  - **NATO TOP SECRET**
  - **TOP SECRET**
  - **TOP SECRET (IDENTI)**
  - **TOP SECRET (IDENTI)**
  - **TOP SECRET (IDENTI)**

- **Security Classification:**
  - **Dipped on a message to the viewing commente dans l'expédition deudit**

- **Contract Number:**
  - **Annex C**

- **Annex D:**
  - **NATO/OTAN**
  - **Foreign/étranger**

- **Annex E:**
  - **Restricted to (Limita):**
    - Canada
    - Restricted to (Limita):

- **Level of Information/Type of Information**:
  - **NATO UNCLASSIFIED**
  - **NATO NON CLASSIFIED**
  - **NATO CONFIDENTIAL**
  - **NATO SECRET**
  - **NATO TOP SECRET**
  - **TOP SECRET**
  - **TOP SECRET (IDENTI)**
  - **TOP SECRET (IDENTI)**
  - **TOP SECRET (IDENTI)**

- **Security Classification:**
  - **Dipped on a message to the viewing commente dans l'expédition deudit**

- **Contract Number:**
  - **Annex C**
| PAGE 2 | | PAGE 3 | | PAGE 4 | | PAGE 5 | | PAGE 6 | | PAGE 7 | | PAGE 8 | | PAGE 9 | | PAGE 10 | | PAGE 11 | | PAGE 12 | | PAGE 13 | | PAGE 14 | | PAGE 15 | | PAGE 16 | | PAGE 17 | | PAGE 18 | | PAGE 19 | | PAGE 20 | | PAGE 21 | | PAGE 22 | | PAGE 23 | | PAGE 24 | | PAGE 25 | | PAGE 26 | | PAGE 27 | | PAGE 28 | | PAGE 29 | | PAGE 30 | | PAGE 31 | | PAGE 32 | | PAGE 33 | | PAGE 34 | | PAGE 35 |
### Request for Proposal #20211085

**Table:**

<table>
<thead>
<tr>
<th>Category</th>
<th>CLS/CRS</th>
<th>CLS/CRS and SDN</th>
<th>LDF/GEX</th>
<th>GO/GF1</th>
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<tbody>
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12. a) Is the description of the work contained within the GPSL PROTECTED and/or CLASSIFIED?

- Yes, classify this form by entering the box corresponding to the category of protection or classification.
- No, unclassified.

12. b) Has the documentation attached to the GPSL been PROTECTED and/or CLASSIFIED?

- Yes, classify the form by entering the box corresponding to the category of protection or classification.
- No, unclassified.

---

**Security Classification / Classification de sécurité**
ANNEX D – RESOURCE CERTIFICATIONS

In accordance with Article 7.4.c of the Contract, the Contractor’s employee(s) or subcontractor(s) must complete and sign the following certifications before they begin the Work or access information connected to the Work.

<table>
<thead>
<tr>
<th>PART 2. AUTHORIZATION</th>
<th>PART 2. AUTORISATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Organization Name (e.g., Acronym, Name of Organization)</td>
<td>Title - Title</td>
</tr>
<tr>
<td>Name (Last Name)</td>
<td>Signature</td>
</tr>
<tr>
<td>Email</td>
<td>Address</td>
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<tr>
<td>Phone</td>
<td>Fax</td>
</tr>
<tr>
<td>Location</td>
<td>Country</td>
</tr>
<tr>
<td>B. Conflict of Interest</td>
<td>Description of Conflict</td>
</tr>
<tr>
<td>Name (Last Name)</td>
<td>Signature</td>
</tr>
<tr>
<td>Email</td>
<td>Address</td>
</tr>
<tr>
<td>Phone</td>
<td>Fax</td>
</tr>
<tr>
<td>Location</td>
<td>Country</td>
</tr>
</tbody>
</table>

For security classification, please refer to the Security Classification Guidelines provided with the Contract.

Security Classification: Classification de sécurité
1. Non-disclosure

I, ____________________, [insert resource name], recognize that in the course of my work as an employee or subcontractor of ___________, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract No. ______________ between Her Majesty the Queen in right of Canada, represented by the Superintendent of OSFI and __________, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but is not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract No. ______________

__________________________
Signature

__________________________
Date
2. Conflict of Interest

I, __________________ [insert resource name], acknowledge that I am employed/hired/engaged by the Contractor, and will assist the Contractor in carrying out the Contractor’s duties under the Contract.

In accordance with section 34 and 35 of 2035 (2021-12-02) General Conditions: Professional Services, incorporated by reference in section 7.4.a, General Conditions of the Contract No. ____________.

I acknowledge that I will not influence, seek to influence or otherwise take part in a decision of Canada knowing that the decision might further my private interest. I warrant that I have no financial interest in the business of a third party that causes or would appear to cause a conflict of interest in connection with the performance of my obligations under the Contract. If such a financial interest is acquired during the period of the Contract, I agree that I will immediately declare it to the Contractor who must immediately declare it to the Contracting Authority.

I warrant that no conflict of interest exists or is likely to arise in my performance of the Contract. In the event that I become aware of any matter that causes or is likely to cause a conflict of interest in relation to my performance under the Contract, I must immediately disclose such matter to the Contractor who must immediately declare it to the Contracting Authority in writing.

Conflict of interest means any matter, circumstance, interest, or activity, which may or may appear to impair the ability to perform the Work diligently and independently.

______________________________
Signature

______________________________
Date
ANNEX E – PERSONS ON CONTRACT – RESPONSIBILITY FOR INSURANCE

As indicated under clause 7.1.3 of the Contract entitled ‘Pre-Authorized Travel and Living Expenses’, eligible and appropriate travel expenses are reimbursed in accordance with the National Joint Council Travel Directive and the Treasury Board Special Travel Authorities’. Section 7 - Persons on Contract. Subsection 7.7 of the Special Travel Authorities addresses the subject of insurance and stipulates that it is the financial responsibility of the Contractor to cover the cost of insurance such as for cars; accidents; sickness; airline travel; immunizations; and any other insurance that the contractor may elect to obtain for business purposes. Canada does not cover any type of insurance for persons on contract.

The undersigned has read and understood and acknowledges the Contractor’s responsibility with regards to insurance:

CONTRACTOR

________________________________________
Signature

________________________________________
Name

WITNESS

________________________________________
Signature

________________________________________
Name
# ANNEX F – DIRECT DEPOSIT ENROLMENT FORM FOR BUSINESSES

**PUBLIC WORKS AND GOVERNMENT SERVICES CANADA**

**DIRECT DEPOSIT ENROLMENT FORM FOR BUSINESSES**

**PRIVACY NOTICE** The personal information is collected under the Financial Administration Act, ss. 17(1) and 35(2). The information is used and disclosed to relevant federal program(s) and your financial institution for direct deposit purposes. Direct deposit payments can not be made without provision of information requested. Personal information is protected in accordance with the provisions of the Privacy Act. Under the Act, individuals and businesses have a right to request access and correct their personal information, if erroneous or incomplete.

Print clearly and in block letters. Please keep the appropriate federal government department informed of any changes to your mailing address. Should the department require clarification on the data you have provided, they will contact you.

## PART A - PARTIE A

1) **Business Name**
   Nom de l'entreprise

   **Business Address**
   Adresse de l'entreprise (Include Unit No., R.R. or P.O. Box - Indiquer le n° d'unité, la route rurale ou la case postale)

   - City, Town
   - Postal Code
   - Province

2) **Authorized Representative's Name**
   Nom du représentant autorisé

   **Email Address**
   Adresse courriel

   **Telephone**
   Téléphone

## PART B - PARTIE B

1) **Branch No.**
   N° de succursale

2) **Institution No.**
   N° de l'institution

3) **Account No.**
   N° de compte

4) **Name of Account Holder(s)**
   Nom(s), titulaire(s) du compte

5) **Financial Institution’s Stamp Here**
   Cachet de l'institution financière ici

---

PWGSC-TPSGC 8001-660 (2012-05)
How to complete Part B
See example below
1. Cheque number - not required.
2. Branch number - 5 digits.
3. Institution number - 3 digits.
4. Account number - as shown on your cheque.

Comment remplir la partie B
Voir l'exemple ci-dessous
1. Numéro du chèque - pas nécessaire.
2. Numéro de la succursale - 5 chiffres.
4. Numéro de compte - comme il est indiqué sur votre chèque.

Example / Exemple

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Void</strong></td>
<td><strong>Nul</strong></td>
<td></td>
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</tr>
</tbody>
</table>

Instead of completing Part B, you can attach a blank cheque for your bank account with "VOID" written on it. DO NOT ENCENLSE ANYTHING OTHER THAN YOUR VOIDED CHEQUE WITH THIS FORM.

Au lieu de remplir la partie B, vous pouvez joindre un spécimen de chèque portant la mention « NUL » au recto. À L'EXCEPTION DE VOTRE SPÉCIMEN DE CHÈQUE, NE JOIGNEZ AUCUN AUTRE DOCUMENT AU PRÉSENT FORMULAIRE.

PART C - PARTIE C

Account Identifier (e.g. vendor code)
Identificateur de compte (p. ex. code de fournisseur)

NOTE:
If you are unsure what account identifier to use, contact the Government of Canada department with whom you do business.

NOTA :
Si vous ne savez pas quel identificateur de compte utiliser, communiquez avec le ministère avec lequel vous faites affaire.

PART D - PARTIE D

1. as an authorized representative of this business, grant the Receiver General for Canada the right to deposit future payment(s) directly into the bank account specified until further notice.

En tant que représentant(e) autorisé(e) de cette entreprise, j'accorde au receveur général du Canada le droit de déposer les prochains paiements directement dans le compte bancaire désigné, et ce, jusqu'à nouvel ordre.

Signature of Authorized Representative
Signature du (de la) représentant(e) autorisé(e)

Preferred Language
Langue de préférence

English
Français

PWGSC-TP50C8001-600 (2012-05)