

Return Bids to:**Retourner Les Soumissions à:**

Natural Resources Canada / Ressources naturelles
Canada

Bid Receiving/ Réception des soumissions
See herein for bid submission instructions/ Voir ici pour
les instructions de soumission des offres

Request for Proposal (RFP)**Demande de proposition (DDP)*****Proposal To: Natural Resources Canada***

We hereby offer to sell to His Majesty the King in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à: Ressources Naturelles Canada

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

Comments – Commentaires**Issuing Office – Bureau de distribution**

Natural Resources Canada / Ressources naturelles
Canada
Finance and Procurement Management Branch

Title – Sujet EnerGuide Rating System Third-Party Quality Assurance Audit Services	
Solicitation No. – No de l'invitation NRCAN- 5000075346	Date September XX, 2023
Requisition Reference No. - N° de la demande 178449	
Solicitation Closes – L'invitation prend fin at – à 2 p.m. (Eastern Standard Time (EST)) on – le November 20, 2023	
Address Enquiries to: - Adresse toutes questions à: Shazeen.Dhanani@NRCAN-RNCAN.gc.ca	
Telephone No. – No de telephone 343-575-6324	
Destination – of Goods and Services: Destination – des biens et services: Natural Resources Canada See herein	
Security – Sécurité THERE ARE NO SECURITY REQUIREMENTS ASSOCIATED WITH THIS REQUIREMENT.	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur Telephone No.:- No. de téléphone: Email – Courriel :	
Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie) <hr/>	
Signature	Date



TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION	3
1.1 INTRODUCTION	3
1.2 SUMMARY	3
1.3 DEBRIEFINGS.....	3
PART 2 - BIDDER INSTRUCTIONS.....	4
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS	4
2.2 SUBMISSION OF BIDS	4
2.3 FORMER PUBLIC SERVANT	5
2.4 ENQUIRIES - BID SOLICITATION	6
2.5 APPLICABLE LAWS	6
2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD.....	6
2.7 BID CHALLENGE AND RECOURSE MECHANISMS	7
PART 3 - BID PREPARATION INSTRUCTIONS	8
3.1 BID PREPARATION INSTRUCTIONS.....	8
PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION	9
4.1 EVALUATION PROCEDURES	9
4.2 BASIS OF SELECTION	9
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	11
5.1 CERTIFICATIONS REQUIRED WITH THE BID	11
5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION.....	11
PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS	14
6.1 SECURITY REQUIREMENTS	14
6.2 INSURANCE REQUIREMENTS.....	14
PART 7 - RESULTING CONTRACT CLAUSES	15
7.1 STATEMENT OF WORK	15
7.2 STANDARD CLAUSES AND CONDITIONS	15
7.3 SECURITY REQUIREMENTS.....	15
7.4 TERM OF CONTRACT.....	15
7.5 AUTHORITIES.....	15
7.6 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS.....	16
7.7 PAYMENT.....	16
7.8 INVOICING INSTRUCTIONS.....	17
7.9 CERTIFICATIONS AND ADDITIONAL INFORMATION	17
7.10 APPLICABLE LAWS	18
7.11 PRIORITY OF DOCUMENTS.....	18
7.12 INSURANCE – NO SPECIFIC REQUIREMENT	18
7.13 DISPUTE RESOLUTION	18
ANNEX “A” STATEMENT OF WORK.....	19
ANNEX “B” BASIS OF PAYMENT	26
APPENDIX “1” - EVALUATION CRITERIA	27
APPENDIX “2” - FINANCIAL BID PRESENTATION SHEET	31
APPENDIX “3” – REPORT CARD	32
APPENDIX “4” – AREA OF SERVICE – ERS HOUSING PROGRAMS INITIATIVES	34



Natural Resources
Canada

Ressources naturelles
Canada

The Articles contained in this document are mandatory in their entirety, unless otherwise indicated. Acceptance of these Articles, in their entirety, as they appear in this document, is a Mandatory requirement of this RFP.

Suppliers submitting a proposal containing statements implying that their proposal is conditional on modification of these clauses or containing terms and conditions that purport to supersede these clauses or derogate from them will be considered non-responsive.

Bidders with concerns regarding the provisions of the Bid Solicitation document (including the Resulting Contract Clauses) should raise such concerns in accordance with the Enquiries provision of this RFP.

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

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



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, the Insurance Requirements and any other annexes.

1.2 Summary

1.2.1 By means of this RFP, NRCan is seeking offers from Bidders for EnerGuide Rating System Third-Party Quality Assurance Audit Services. Quality Assurance activities over the duration of this RFP will consist of the following:

1. Key Component Modelling Assessment,
2. File Assessment and Modelling Verification (Level 3),
3. On-Site Evaluation (Level 6),
4. Blower Door tests and;
5. Miscellaneous QA
6. An on-site or virtual evaluation of installed heat pump system(s) and related measures

1.2.2 The period of the Contract is from date of Contract to March 31, 2024 inclusive with an option to extend the term of the Contract by up to 2 additional one-year periods.

1.2.3 NRCan intends to award up to 3 Contracts.

1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within fifteen (15) working days from receipt of the results of the bid solicitation process. The debriefing will be done in writing, by email.



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

The 2003 _____ (2023-06-08) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

- **In the complete text content (except Section 1 and 3)**
Delete: Public Works and Government Services Canada” and “PWGSC”
Insert: “Natural Resources Canada.” and “NRCan”
- **At 02 Procurement Business Number:**
Delete: “Suppliers are required to”
Insert: “It is suggested that suppliers”
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 1:**
Delete: in its entirety
- **At 08 Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2a:**
Delete: : The only acceptable email address to use with CPC Connect for responses to bid solicitations issued by PWGSC headquarters is: tpsgc.pareceptiondessomissions-apbidReceiving.pwgsc@tpsgc-pwgsc.gc.ca.
or, if applicable, the email address identified in the bid solicitation.
Insert: The only acceptable email address to use with CPC Connect for responses to bid solicitation issued by NRCan is: procurement-appvisionnement@NRCan-RNCan.gc.ca
- **At 08, Transmission by facsimile or by Canada Post Corporation's (CPC) Connect service, article 2b:**
Delete: “six business days”
Insert: “five business days”
- **At 20, Further information, article 2b:**
Delete: in its entirety

2.2 Submission of Bids

Bidders must submit all proposals using the Canada Post Canada (CPC) Connect service. Given the current constraints on NRCan’s networks, the electronic mail system has a limit of 1GB per single message received and a limit of 20GB per conversation.

Bids must be submitted no later than the date and time indicated on page 1 of the bid solicitation.

Only bids submitted using CPC Connect service will be accepted.

At least five (5) business days before the bid solicitation closing date, it is necessary for the Bidder to send an email requesting to open CPC Connect conversation to the following address:

procurement-appvisionnement@NRCan-RNCan.gc.ca



Note 1: Bids will not be accepted if e-mailed directly to this address. This e-mail address is to be used to open CPC Connect conversation, as detailed in the Standard Instructions [2003 \(article 08, paragraph 2\)](#), or to send bids through CPC Connect message if the bidder is using its own licensing agreement for CPC Connect.

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

IMPORTANT: It is requested that you write the bid solicitation number in "Subject" of the email:
[NRCan – 5000075346 – EnerGuide Rating System Third-Party QA Services](#)

NRCAN will not assume responsibility for proposals directed to any other location.

The onus is on the Bidder to ensure that the bid is submitted correctly using CPC Connect service. Not complying with the instructions may result in NRCAN's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCAN reserves the right to reject any proposal not complying with these instructions.

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

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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

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

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

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

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



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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

2.4 Enquiries - Bid Solicitation

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

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

2.5 Applicable Laws

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

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

2.6 Improvement of Requirement During Solicitation Period

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



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



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- The Bidder must submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The CPC Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

Canada requests that the Bidder submits its bid in separately saved documents as follows:

Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications

If the Bidder is simultaneously providing copies of its bid using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through CPC Connect service, the wording of the electronic copy provided through CPC Connect service will have priority over the wording of the other copies.

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, bidders should:

- 1) Include all environmental certification(s) relevant to your organization (e.g., ISO 14001, Leadership in Energy and Environmental Design (LEED), Carbon Disclosure Project, etc.)
- 2) Include all environmental certification(s) or Environmental Product Declaration(s) (EPD) specific to your product/service (e.g., Forest Stewardship Council (FSC), ENERGYSTAR, etc.)

Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

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

Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Financial Bid Presentation Sheet in Appendix 2.

Section III: Certifications

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



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Appendix "1" – Evaluation Criteria.

4.2 Basis of Selection

4.2.1 Mandatory Technical Criteria

A bid must comply with the requirements of the bid solicitation and meet all mandatory technical evaluation criteria to be declared responsive.

4.2.1 Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria;
2. Bids not meeting (a) or (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 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 (60%) and Price (40%)			
	Bidder 1	Bidder 2	Bidder 3
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price	\$55,000.00	\$50,000.00	\$45,000.00



Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).
- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: _____

OR

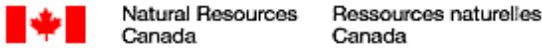
Name of each member of the joint venture:

Member 1: _____

Member 2: _____

Member 3: _____

Member 4: _____



Identification of the administrators/owners/Board of Directors:

SURNAME	NAME	TITLE

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's website](#).

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

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

SACC Manual clause [A3005T \(2010-08-16\)](#) Status and Availability of Resources

5.2.3.2 Education and Experience

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

5.2.3.3 Former Public servant

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



Natural Resources Canada
Ressources naturelles Canada

SIGNATURE for CERTIFICATION

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

Name

Date

Signature of Authorized Representative



PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

There are no security requirements associated with this procurement.

6.2 Insurance Requirements

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



PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "____" and the Contractor's technical bid entitled _____, dated _____. (*to be completed at contract award*)

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

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

The following clauses apply to and form part of this contract:

7.3 Security Requirements

7.3.1 There is no security requirement applicable to the Contract.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2024 inclusive.

7.4.2 Option to Extend the Contract

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

Canada may exercise this option at any time by sending a written notice to the Contractor at least 10 calendar days 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.

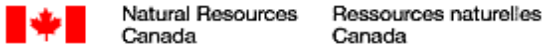
7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Shazeen Dhanani
Title: Procurement Specialist
Natural Resources Canada
Procurement Services Unit
Telephone: 343-575-6324
E-mail address: Shazeen.Dhanani@NRCan-RNCan.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the



scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

7.5.2 Project or Technical Authority

The Project Authority for the Contract is:

Name: _____ (to be filled out at contract award)
 Title: _____
 Organization: _____
 Address: _____
 Telephone: ____ - ____ - _____
 E-mail address: _____

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

7.5.3 Contractor's Representative

Name: _____ (to be filled out at contract award)
 Title: _____
 Organization: _____
 Address: _____
 Telephone: ____ - ____ - _____
 E-mail address: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

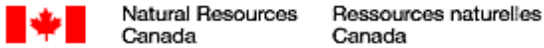
7.7 Payment

7.7.1 Basis of Payment - Firm Hourly Rates

The Contractor will be paid all inclusive firm hourly rates as follows, for work performed in accordance with the Contract. Applicable Taxes are extra.

Category	Name (if applicable)	Firm Hourly Rate
_____	_____	\$ _____
_____	_____	\$ _____

Total Estimated Cost: \$ _____



Option to Extend the Contract

During the extended period of the Contract, the Contractor will be paid the following firm hourly rates to perform all the Work in relation to the contract extension.

Category	Firm Hourly Rate
_____	\$ _____
_____	\$ _____

7.7.3 Method of Payment

Multiple Payments

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

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

7.8 Invoicing Instructions

Invoices shall be submitted using **the following method:**

E-mail:
Invoicing-Facturation@nrcan-rncan.gc.ca
Note: Attach "PDF" file. No other formats will be accepted

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

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

7.9 Certifications and Additional Information

7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the



Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

7.10 Applicable Laws

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

7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions 2035 (2022-12-01), General Conditions - Higher Complexity - Services
- (d) Annex A, Statement of Work
- (e) Annex B, Basis of Payment
- (f) the Contractor's bid dated _____, (*insert date of bid at Contract Award*)

7.12 Insurance – No Specific Requirement

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

7.13 Dispute Resolution

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



Natural Resources
Canada

Ressources naturelles
Canada

ANNEX “A” STATEMENT OF WORK

SW.1.0 TITLE

EnerGuide Rating System Third-Party Quality Assurance Audit Services

SW.2.0 BACKGROUND

The EnerGuide Rating System (ERS) is a national system developed by Natural Resources Canada (NRCan) to rate the energy performance of houses. Regional partners use this system for the purpose of assessing and depicting the energy performance of houses in their jurisdictions.

The rating system is designed to achieve the following:

- help Canadian homeowners, industry and stakeholders, become “energy literate” regarding homes and the decisions related to them;
- provide specific, readily accessible energy performance information that is widely used to support decision making in designing, constructing, purchasing, renovating, or operating a home; and
- facilitate energy performance advancements in new and existing low-rise housing sectors by encouraging home builders and homeowners to improve the houses that they live in, build, or renovate. This should lower operating costs, increase occupant comfort, and reduce the environmental impact of housing energy use in Canada.

The ERS underpins the delivery of NRCan’s Housing Programs (ENERGY STAR® for New Homes, Greener Homes, and R2000) as well as many other programs delivered by partners across the country.

National, third-party quality assurance (QA) is performed to ensure the integrity, transparency and accountability of work produced under NRCan’s ERS. The QA process validates overall performance, effectiveness and compliance with program procedures and guidelines.

SW.3.0 OBJECTIVES

Quality Assurance (QA) ensures that quality-related issues and problems are identified and resolved. It protects the interests of Canadian homeowners, builders and stakeholders who rely on the accuracy of the information generated under the ERS. QA ensures that the three key components of the system – people, data, and reporting mechanisms – are meeting the operational and performance levels as described within the various ERS documents. QA results are also extremely important in the design of future programs and energy efficiency initiatives for both NRCan and external stakeholders.

INRCan will contract third-party quality assurance auditors (QAA) to implement its QA program across Canada. QAA activities may be performed under both HOT 2000 version 10.51 and up to date version 11 (ERS version 15) and related Standards, including updates made to the ERS procedures / reference documents. QA activities consist of the following:

Key Component Modelling Assessment - The purpose of this quality assurance assessment is to verify that key components of the electronic file have been modelled in compliance with the HOT2000 modelling procedures and other ERS reference manuals.

File Assessment and Modelling Verification (Level 3) - The purpose of this QA assessment is to verify that *all* components of the electronic file have been modelled in compliance with the HOT2000 modelling procedures and other ERS procedural documentation. The house is altered in HOT2000 using the data indicated in the energy advisor’s (EA) data collection form, supplementary notes, photos and sketches/house plans. The file assessment and modelling verification also serves to acquire insights into the service organization’s and EA’s file management proficiency, including retention, organization and tracking procedures.



On-Site Evaluation (Level 6) - NRCan will require a Quality assurance auditor to perform an ERS evaluation on a house or MURB to be used as a baseline for evaluating energy advisors in future.

Blower Door tests - The objective of this requirement is to validate the air tightness test done previously by an energy advisor.

Miscellaneous QA - The objective of this requirement is to perform miscellaneous QA tasks not specifically mentioned above such as, but not limited to, reviewing QA related reports and unscheduled QA auditing activities for all levels as the need arises and deemed necessary by NRCan.

SW.4.0 PROJECT REQUIREMENTS

SW.4.1 Tasks, Deliverables, Milestones and Schedule

The Project Authority will provide the QAA with a list of files to be subjected to the audit. The Project Authority will communicate with the SO to request all file information and documentation required to carry out the audit. Time schedules will be at the discretion of NRCan and will vary depending on:

- the number of SO's
- the volume of files to be audited
- the urgency of the audit
- availability of auditors vs. volume of files to be audited

Task/Activities	Deliverables/Milestones	Time Schedule	Constraints
Key Component Modelling Assessment	<p>Verify key components of the electronic (h2k) file have been modelled in compliance with HOT2000 modelling procedures and other ERS reference documents. Key components are:</p> <ul style="list-style-type: none"> • specifications; • building envelope; • space conditioning; • hot water systems; • ventilation; and • blower door testing. <p>A Key Component Verification Form is to be completed for each file audited.</p>	As determined by NRCan	Time constraints possible due to response delays at the service organization level.
Level 3 - File Assessment and Modelling Verification	<p>Verify all components of the electronic (h2k) file have been modelled in compliance with HOT2000 modelling procedures and other ERS reference documents, by verifying:</p> <ul style="list-style-type: none"> • that required documentation is complete; • that data collection form entries are consistent with the photos, sketches, plans and field notes; • verify that house plans, drawings and sketches contain the geometry details and calculations required to fully model the house; • verify that geometry calculations are correct; and • Alter the energy advisor's HOT2000 file with corrected data to compare against the energy advisors H2K file. Auditor's 	As determined by NRCan.	Time constraints possible due to response delays at the service organization level.



Task/Activities	Deliverables/Milestones	Time Schedule	Constraints
	<p>corrected HOT2000 file to be included in deliverables.</p> <p>A File Assessment and Modelling Verification Form is to be completed for each file audited.</p>		
Level 6 - On-Site Audit (with the EA present)	<p>On-Site QA audit, where an energy advisor evaluates a house where the QAA is posing as a homeowner. The QAA observes and assesses the EA during the on-site energy evaluation. The goal is to determine the quality of service that an energy advisor provides when conducting an EnerGuide home energy evaluation including assessing their adherence to ERS procedures and the overall homeowner experience (e.g. positive interactions with the homeowner, accessing all attics, performing the blower door test according to procedures, showing the homeowner where all of the air leaks are in the house etc.).</p> <p>A File Assessment and Modelling Verification Form is to be completed for each file audited, and a report on how well the energy advisor performed and any deficiencies in the procedures.</p>	As determined by NRCan	Time constraints can be, but not limited to; -Bidder travel approval process -logistics of time and location of on-site - homeowner and/or builder availability.
Evaluation (on-site)	<p>An energy evaluation (D) is performed by the QAA on a house or MURB. It includes the on-site data collection gathering, collection of photos, and modelling the house in HOT2000.</p> <p>The goal is to have data on a house that may be re-tested by energy advisors in future.</p> <p>Deliverables include data collection form, photos and HOT2000 file.</p>	As determined by NRCan	Time constraints can be, but not limited to; -Bidder travel approval process -logistics of time and location of on-site - homeowner and/or builder availability
Blower door test (on-site)	<p>An automatic blower door test with measured volume and exhaust devices depressurization test is performed a house, or MURB.</p> <p>The goal is to have data on a house that may be re-tested by energy advisors in future, or confirming a test that has already been done by an energy advisor.</p> <p>Deliverables include the detailed blower door report, calculations for volume, and results of the exhaust devices depressurization test.</p>	As determined by NRCan	Time constraints can be, but not limited to; -Bidder travel approval process -logistics of time and location of on-site - homeowner and/or builder availability.
Combination of audits <ul style="list-style-type: none"> • Onsite evaluation, • Peer review audit and • File Assessment 		As determined by NRCan	Time constraints can be, but not limited to: <ul style="list-style-type: none"> • Bidder travel approval process • logistics of time and location of on-



Task/Activities	Deliverables/Milestones	Time Schedule	Constraints
and Modelling Verification			<ul style="list-style-type: none"> site homeowner and/or builder availability.
Miscellaneous QA	As the need arises and deemed necessary by NRCan.	As determined by NRCan	
An on-site or virtual evaluation of installed heat pump system(s) and related measures	<p>An on-site evaluation will involve evaluating work related to the installation of heat pump system(s). It includes:</p> <ul style="list-style-type: none"> Scheduling evaluations On-site data collection gathering and collection of photos If requested, an ERS home energy evaluation <p>The goal is to determine compliance of installed equipment with requirements.</p> <p>A virtual evaluation is similar and will be conducted using a smart-phone video telephone application, such as video call.</p> <p>Deliverables include data collection forms, photos and/or screen captures, and energy evaluation reports, if applicable.</p>	As determined by NRCan	<p>Time constraints can be, but not limited to;</p> <ul style="list-style-type: none"> -Bidder travel approval process -logistics of time and location of on-site or virtual evaluation - homeowner availability

SW.4.2 Reporting Requirements

The Project Authority will coordinate the audit process by ensuring project requirements, contractor's tasks, deliverables, milestone, and schedule obligations based on communicated timelines determined by NRCan.

SW.4.3 Method and Source of Acceptance

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

After each Contract, a Report Card (See Appendix 3) will be provided to the Quality Assurance Auditor detailing and evaluating their performance. The report card(s) will be used to determine the Quality Assurance Auditor's ability to provide excellent service.

Quality Assurance Auditors will be evaluated based on the following:

Identification of error in file: Files are reviewed for their completeness and accuracy in modelling. It is important for the QAA to properly identify all issues. Missed issues are just as unsatisfactory as wrongly identified issues.

Explanation of errors "comments": Comments by the QAA should *contain an adequate level of detail that can be easily understood and not require further or more in depth clarifications for comprehension.*

Deliverables and Punctuality: *The deliverables are remitted to NRCan according to the objective, tasks and timeframe as outlined in the statement of work in the duly signed procurement service contract.*

For more details, please refer to Annex "B" – Report Card.



SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW

SW.5.1 Contractor's Obligations

In addition to the obligations identified herein, the Contractor shall:

- keep all documents and proprietary information confidential;
- submit all deliverables in the electronic format via [Canada Greener Homes](#)
- participate in teleconferences and webinar training as needed;
- attend meeting at NRCan sites, if required;
- be available for any follow-up meetings and/or discussions with NRCan following the audit;
- must re-write all mandatory exams upon the third-year anniversary of passing said exams; and,
- deliver under both HOT2000 version 10.51 and up to date version 11 (ERS version 15) and related Standards, including updates made to the ERS procedures / reference documents.

SW.5.2 NRCan's Obligations

NRCan shall provide:

- The URL, user name and password to access the most up-to-date and pertinent program documentation.
- Instructions on downloading HOT-2000 residential energy analysis software.
- Training by Webinar on the use of NRCan QA forms/templates for reporting on QA.
- Any additional training material required to perform miscellaneous tasks (if applicable)

After completion of each contract, a Report Card (see Appendix 3) will be sent to the Quality Assurance Auditor (see Appendix 2)

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

Location of work will be in the Contractor's place of business.

SW.6.0 REQUIRED RESOURCES OR TYPES OF ROLES TO BE PERFORMED

- Quality Assurance Auditor (QAA)
- Verify key components of the electronic (h2k) file
- Level 3 - File Assessment and Modelling Verification
- Level 6 - On-Site Audit (with the EA present)
- Evaluation (on-site)
- Blower door test (on-site)
- On-site or virtual evaluation of installed heat pump system(s) and related measures
- Miscellaneous QA

SW.7.0 APPLICABLE DOCUMENTS AND GLOSSARY

SW.7.1 Applicable Documents

Current NRCan housing program ERS pillar documentation with respect to technical and administrative procedures are:

EnerGuide Rating System - Administrative Procedures
 EnerGuide Rating System - Technical Procedures
 EnerGuide Rating System - HOT2000 User Guide
 EnerGuide Rating System - Workaround and Conversion Guide for HOT2000



Natural Resources
Canada

Ressources naturelles
Canada

EnerGuide Rating System - Standard
EnerGuide Rating System - Quality Assurance Procedures

The above documentation, as well as other useful resources such as ERS v.15 Competencies, FAQ's, etc. will become available to candidates meeting Standing Offer's requirements.

SW.7.2 Relevant Terms, Acronyms and Glossaries

Blower Door Service

The blower door test is a test that determines the airtightness of a building and is composed of three components. The first is a test to produce the metrics for air tightness: Air change rate at 50Pa (ACH50), and equivalent leakage area (ELA). The second component of the blower door test is a walk-through of the building to determine air leakage locations. Lastly, the blower door equipment is used to perform an exhaust devices depressurization test.

EnerGuide Rating System

A national system developed by Natural Resources Canada to rate the energy performance of houses. Regional partners use this system for the purpose of assessing and depicting the energy performance of houses in their jurisdictions.

Energy Advisor (EA)

An individual registered with Natural Resources Canada to deliver the EnerGuide Rating System *Basic Service* and additional services.

Energy evaluation

An evaluation of the energy-related features of a home. The evaluation results in an EnerGuide rating, which facilitates comparisons to the energy performance of comparable homes in similar climate zones across Canada. The home energy evaluation must be performed by a registered energy advisor and the rating is calculated based on standard operation conditions.

ENERGY STAR for New Homes (ESNH)

An international symbol that promotes homes that are more energy efficient than those built to minimum building code requirements.

HOT2000

An energy simulation modelling software developed and maintained by Natural Resources Canada.

Multi-unit residential building (MURB) - A building that has two or more units fully or partially stacked, or joined by a common space if not stacked, that may consist of a combination of residential and non-residential occupancies.

Bidder:

Also known as a **QAA or Supplier** is the holder of an SA with NRCan.

Project Authority:

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 content of the work under the Contract.

Proposal:

Also known as the **Bid**, is the formal response to the RFSA for consideration as a potential supplier according to the instructions in the MERX advertisement and as outlined in the context of this document.

Quality Assurance (QA):

A systematic set of activities to ensure that Natural Resources Canada's housing initiatives are delivered to meet all program requirements and to assess customer satisfaction and the accuracy of EnerGuide rating files. This ensures consistency in the delivery of the EnerGuide Rating System.



Natural Resources
Canada

Ressources naturelles
Canada

Quality Assurance Auditor (QAA):

A third-party organization or person who undertakes quality assurance audit activities on behalf of Natural Resources Canada on service organizations and their energy advisors.

Service Organization (SO):

An organization under a licence agreement with Natural Resources Canada, whose role is to implement and deliver Natural Resources Canada's EnerGuide Rating System services.



Natural Resources
Canada

Ressources naturelles
Canada

ANNEX "B" BASIS OF PAYMENT

(Will be completed at contract award)



APPENDIX “1” - EVALUATION CRITERIA

Bidders are advised to address these criteria in the following order and in sufficient depth in their proposals to enable a thorough assessment. NRCan’s assessment will be based solely on the information contained within the proposal. NRCan may confirm information or seek clarification from bidders.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the criteria will not be considered demonstrated for the purpose of this evaluation.

The Bidder should provide complete details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All criteria for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose time frame overlaps that of another referenced project will only be counted once. For example: project one time frame is July 2001 to December 2001; project two time frame is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

1. Technical Criteria

1.1 Mandatory Evaluation Criteria

Criterion ID	Mandatory Criteria	Proposal Page #	Compliant
M1	<p>Energy Advisor Experience and/or Quality Assurance Experience:</p> <p>The Bidder must propose resources that have personally completed at least 500 evaluations (onsite and modelling) for at least one of the following programs:</p> <ul style="list-style-type: none"> • EnerGuide for Houses A or D files (1998-2006) • EcoEnergy (2007-2015) D files • EnerGuide Rating System (2015-2023) D files • EnerGuide for New Homes • ENERGYSTAR • R2000 <p>Or,</p> <p>have completed at least 100 Level 3 quality assurance audits for</p> <ul style="list-style-type: none"> • EnerGuide for Houses (1998-2006) • EcoEnergy (2007-2015) • EnerGuide Rating System (2015-2023) • EnerGuide for New Homes • ENERGYSTAR • R2000 <p>The Bidder must clearly describe in what year they performed the evaluations, which programs the files were submitted under, and the number and type of houses they have evaluated/reviewed: ages (year built), building types (MURB, existing house, new house), construction types.</p>		<input type="checkbox"/> Yes <input type="checkbox"/> No
M2	<p>Curriculum Vitae:</p>		<input type="checkbox"/> Yes <input type="checkbox"/> No



	<p>The Bidder MUST submit a Curriculum Vitae (CV) for ALL proposed resources who will be performing the ERS quality assurance audits. The information provided in the CV will be used to validate the compliance of the Mandatory Technical Criteria.</p> <p>All CVs should include work experience in housing, and as an energy advisor, quality assurance specialist, or quality assurance auditor. Details should include those related to the requirements and their ability to perform the tasks as described in the Statement of Work.</p>		
<p>M3</p>	<p>Services Offered</p> <p>The Bidder and all proposed resources MUST offer EnerGuide Rating System QA audit services for at least one of the categories below. The Bidder must indicate the category(ies) for which they would like to be considered, and the experience they have with each:</p> <ul style="list-style-type: none"> • Existing Houses • New Houses • MURBs • ENERGY STAR for New Homes <ul style="list-style-type: none"> ○ Bidder agrees to provide service under both versions HOT2000 10.51 and version 11 (ERS v15) during the transition period. • R2000 • On-site evaluations (blower door tests, and full evaluations) 		<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>M4</p>	<p>Certifications:</p> <p>The Bidder and each of its proposed resources must have passed, or be willing to write and pass, on the first attempt, the following ERS V15 exams as part of the pre-qualifications procedures prior to receiving a Standing Offer as follows depending on QA services offered:</p> <ul style="list-style-type: none"> • Foundation level (required of all QAA) • Energy advisor (required of all QAA) • Quality Assurance Specialist (required for all QAA) • MURB (if applying to do QA on MURBS) • ENERGYSTAR (if applying to do QA on ENERGYSTAR) 		<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>M5</p>	<p>QAA Exam:</p> <p>The Bidder and each of its proposed resources must write and pass, on the first attempt, the Practical QAA Examination (mock house/MURB file) administered by NRCan (no cost) prior to the bid evaluation.</p> <p>Note: The bidder will be provided the practical QAA exam at the time of bid evaluation. Details will be provided prior to the exam.</p>		<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>



<p>M6</p>	<p>Compliance history:</p> <p>The Bidder must not have been subject of a Level 1 to 3 compliance report and must not have been suspended by NRCan in the past.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>M7</p>	<p>QAA Services Delivery:</p> <p>Bidders MUST identify the province and/or regions in which they want to provide QA service (Appendix “4” Area of Service – Housing Programs Initiative). In order to provide QA services in the province of Quebec, the Bidder and/or the resource(s) MUST be able to write reports in French.</p> <p>Bidders may apply either as a company with resources or as an individual. <i>All criteria must be met in both instances.</i></p> <p>Bidders or any proposed resources who currently have an Agreement to provide energy assessment service or in-house QA audits for a service organization in a given province and/or region CANNOT compete to deliver QA services in that area.</p> <p><i>Example: Perform energy evaluations on Vancouver Island: QAA cannot perform QA on files for organizations on Vancouver Island but can deliver QA services for BC’s mainland.</i></p> <p>Note: The areas of service to the Yukon Territory, Northwest Territories and Nunavut Territory will be subject to the Comprehensive Land Claims Agreement http://www.ainc-inac.gc.ca/al/index-eng.asp</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>M8</p>	<p>Minimum Computer Requirements:</p> <p>Bidder must have high speed Internet access Bidder must have a valid email address Bidder must have a computer capable of running the following computer software: HOT2000, the ERS report generator, EXCEL with macros, a PDF reader, ability to view photos of all types. Bidder’s must have or be able to create a user profile in the Natural Resources Canada ERS portal, including maintaining a GCKey.</p> <p>The Bidder is to clearly demonstrate that they possess these minimum requirements by providing details in the Bidder’s proposal.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>



4.1.1.2 Point Rated Technical Criteria

Criterion ID	Mandatory Criteria	Proposal Page #	Score
G1	<p>The Bidder should demonstrate that each resource has EnerGuide Energy Advisor Experience:</p> <p>Points will be awarded for the number of years as an <u>active</u> (submitting at least one file) Energy Advisor</p> <ul style="list-style-type: none"> • 0 points – less than 3 years • 5 points – 4 to 7 years • 10 points – 8 to 10 years • 15 points – 11 to 17 years • 25 points – 18+ years 		___ points
G2	<p>The Bidder should demonstrate that each resource has EnerGuide Quality Assurance Experience:</p> <p>Points will be awarded for the number of years experience with Quality assurance for EnerGuide Rating System programs</p> <ul style="list-style-type: none"> • 0 points – less than 3 years • 5 points – 4 to 7 years • 10 points – 8 to 10 years • 15 points – 11 to 17 years • 25 points – 18+ years 		___ points
G3	<p>The Bidder should demonstrate that each resource has experience in a residential construction trade by providing the following:</p> <ol style="list-style-type: none"> 1. Specify what work was performed 2. The Employer 3. The Number of years worked <p>1 point will be awarded for each year working in residential construction up to a maximum of 10 points.</p>		___ points
G4	<p>Certifications, professional designations: Additional training in construction and building science are deemed an asset. Additional credit will be given to applicants who have obtain certifications from a recognized institutions offering training in building construction and building science (e.g. University or college, a recognized industry association such as HRAI RASDAT designation, Level 1 Thermographer, BSc in Building Science). Please list your certifications and designations, the certifying body, and the year in which they were obtained.</p> <p>5 points awarded for each certification (max 40 points).</p>		___ points
Technical Points		Max 100	


APPENDIX “2” - FINANCIAL BID PRESENTATION SHEET
1. Fees

The all-inclusive firm hourly rate for the completion of this project is in Canadian funds and does not include applicable taxes.

A	B	C
QAA Service	Estimated Number of Hours to complete Level 2	Estimated Number of Hours to complete Level 3
1. Existing Housing – Pre-Retrofit D file	0.5	2.5
2. Existing Housing – Post-Retrofit E file	0.25	1
3. D/E (pairs) files	0.75	3.25
4. New Homes file	0.5	2.25
5. R-2000 file	0.5	2.5
6. ENERGYSTAR performance file	0.5	2.5
Initial Period Hourly Firm Rate :	\$	
OPTION Year 1 Hourly Firm Rate:	\$	
OPTION Year 2 Hourly Firm Rate:	\$	

*** ESTIMATED NUMBER OF HOURS PRESENTED HEREIN IS USED FOR EVALUATION PURPOSES ONLY AND IT IS NOT A COMMITMENT BY CANADA.**

**** FOR ANY ERRORS IN THE CALCULATION, THE *HOURLY* RATE SCHEDULE WILL BE UPHELD.**

Any estimated level of effort specified in the Pricing Details detailed above is provided for financial proposal evaluation purposes only. It is only an approximation of the requirements and is not to be considered as a contract guarantee nor as a commitment by NRCan to respect those estimated in any resulting contract.



APPENDIX “3” – REPORT CARD

For each Quality Assurance Audit contract, one file will be selected at random to be reviewed by Natural Resources Canada (NRCan internal Quality Assurance). The difference between that review and the Quality Assurance Auditor (QAA) review will determine the scoring of this Report Card. The entire contract will be assumed to be of the same quality as the one file.

Please note: A score of four (4) or less on three (3) individual contracts within a given fiscal year will result in termination of the supply arrangement between the QAA and NRCan.

Report Card		
Vendor Performance On Contracts		
Name of QAA:		
Contract #:		
File selected:		
Criteria	Definition	Score
Identification of errors in file	Definition: Files are reviewed for their completeness and accuracy in modelling. It is important for the QAA to properly identify all issues. Missed issues are just as unsatisfactory as wrongly identified issues.	
	0 points	The QAA review for the associated file should be considered “incomplete” due the amount/scope of discrepancies found.
	2 points	The discrepancies found should have been caught by the QAA. The issues would affect the GJ rating and could affect grant amounts.
	3 points	The discrepancies found should have been caught by the QAA. The issues would not have a significant impact the GJ rating but could affect grant amounts.
	4 points	Discrepancies found were trivial and had no impact on the GJ rating or grant amount.
	5 points	NRCan internal QA review and QAA identified the same errors.
Explanation of errors "comments"	Definition: Comments by the QAA should <i>contain an adequate level of detail that can be easily understood and not require further or more in depth clarifications for comprehension.</i>	
	0 points	No comments provided.
	1 point	Comments did not provide enough details.
	2 points	Comments provided adequate details.
	3 points	Comments provided an excellent level of details.
Deliverables and Punctuality	Definition: <i>The deliverables are remitted to NRCan according to the objective, tasks and timeframe as outlined in the statement of work in the duly signed procurement service contract.</i>	
	0 points	The deliverables were not submitted within the timelines identified in the statement of work in the duly signed procurement service contract. A valid reason was not provided by the QAA prior to the due-date regarding any issue nor was an extended timeframe permitted.



Natural Resources
Canada

Ressources naturelles
Canada

	1 point	The deliverables were not submitted within the timelines identified in the statement of work in the duly signed procurement service contract, but the QAA had contacted NRCan prior to the due-date and provided a valid justification for delay and extension for delivery.	
	2 points	The deliverables were submitted within the timelines identified in the statement of work in the duly signed procurement service contract.	
Total Score: (out of 10)			0
Scoring guidelines:			
Score: 0 to 4	The deliverables are of a very poor quality. This may result in withholding payment by NRCan or termination of the contract.		
Score of 5 to 6	The deliverables are of a poor quality. This may result in withholding payment by NRCan or termination of the contract.		
Score of 7	The deliverables are satisfactory. Attention should be taken in areas identified as not receiving maximum points.		
Score of 8	The deliverables are of good quality. Attention should be taken in areas identified as not receiving maximum points.		
Score of 9 to 10	The deliverables are of excellent quality.		
Total Score:(out of 10)			0



APPENDIX “4” – AREA OF SERVICE – ERS HOUSING PROGRAMS INITIATIVES

Exclusion: Individuals who are currently under an agreement to provide an energy evaluation service to/for a Housing Program Service Organization will be excluded from auditing any company that are in direct competition with.

Name of Applicant			
Applicant e-mail (mandatory)			
Work Telephone number of Applicant			
Work Fax number of Applicant			
Specify Language(s) proficiency (oral and written) in English and/or French	<input type="checkbox"/> English	<input type="checkbox"/> French	<input type="checkbox"/> Either English or French
Training language preference	<input type="checkbox"/> English	<input type="checkbox"/> French	
HOT2000 Software training required	<input type="checkbox"/> Yes		<input type="checkbox"/> No
Energy evaluation Equipment	<input type="checkbox"/> Yes		<input type="checkbox"/> No
If the Bidder is including on-site services as part of their proposal, they must clearly demonstrate that they possess or have access to mandatory equipment specified in ERS Technical Procedures document Section 2.4.1. Details of such equipment must be provided in the Bidder's proposal.			

Bidders must indicate the regions or area(s) within that region in which they CAN provide QA services. Bidders who are providing energy assessment services or in-house QA auditor for an SO in a given region or area(s) within that region CANNOT apply to deliver QA services in that same region or area(s) within that region. Bidders who are found by NRCan to be in conflict with a specific region or area(s) within that region will be disqualified from the contract in question.

Y/N		Y/N	
	Newfoundland		Yukon Territory
	Nova Scotia		Northwest Territories
	New Brunswick		Nunavut
	Prince Edward Island		Ontario
	Quebec		Manitoba
	Saskatchewan		British Columbia
	Alberta		

NOTE: THE AREAS OF SERVICE TO THE YUKON TERRITORY, NORTHWEST TERRITORIES AND NUNAVUT TERRITORY WILL BE SUBJECT TO THE COMPREHENSIVE LAND CLAIMS AGREEMENT.

<http://www.aadnc-aandc.gc.ca/eng/1100100028568/1100100028572>