



**Return Bids to:**

Natural Resources Canada

Bid Receiving, See herein for bid submission instructions and the following:

**Request for Proposal (RFP)**

**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.

**Comments**

**Issuing Office**

Natural Resources Canada  
Finance and Procurement Management Branch  
1 Challenger Drive  
Dartmouth, Nova Scotia  
B2Y 4A2

<b>Title ; Update to Energy Management Information System (EMIS) Guidelines</b>	
<b>Solicitation No.</b> NRCan- 5000079829	<b>Date</b> March 11, 2024
<b>Requisition Reference No.</b> T-180679	
<b>Solicitation Closes</b> at 2 p.m. (Eastern Daylight Time (EDT)) on April 16, 2024	
<b>Address Enquiries to:</b>  <a href="mailto:Julia.pace@NRCan-RNCan.gc.ca">Julia.pace@NRCan-RNCan.gc.ca</a>	
<b>Telephone No.</b>  902-719-4856	
<b>Destination – of Goods and Services:</b>  Natural Resources Canada 1615 Lionel-Boulet Boulevard PO Box 4800 1-1210 Varenes, QC J3X 1S6	
<b>Security</b>  THERE ARE NO SECURITY REQUIREMENTS ASSOCIATED WITH THIS REQUIREMENT.	
<b>Vendor/Firm Name and Address</b>          <b>Telephone No.:</b> <b>Email:</b>	
<b>Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print)</b>          <hr/>	
<b>Signature</b>	<b>Date</b>



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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 Resource Consent Form and any other annexes.

### **1.2 Summary**

1.2.1 By means of the RFP, Natural Resources Canada (NRCan) is seeking a contractor to update its Emergency Management Information System (EMIS) Guidelines. Energy management is crucial for organizations seeking to optimize energy consumption, reduce costs, and minimize their environmental impact. The use of an EMIS as a performance management system enables organizations to plan, make decisions, and take action to manage energy use and costs, and hence play a pivotal role in achieving energy performance improvements.

- The start date will be in April 2024 for work to be completed on or before March 31, 2025.

1.2.2 This bid solicitation allows bidders to use the CPC Connect service provided by Canada Post Corporation to transmit their bid electronically. Bidders must refer to Part 2 entitled Bidder Instructions, and Part 3 entitled Bid Preparation Instructions, of the bid solicitation, for further information.

### **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-apbidReceivinq.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.pareceptiondessomissions-apbidReceivinq.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](mailto: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

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

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](mailto: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 – 5000079829 – EMIS Update**

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 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 Applicable Laws

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

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

## 2.6 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 five (5) calendar days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

## 2.7 Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following reasons: as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#)

1. Where the Foreground IP consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

## 2.8 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.



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## 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
- Section IV: Additional Information

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 Appendix 3.

#### **Section III: Certifications**

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



#### **Section IV: Additional Information**

1. In Section IV of their bid, bidders should provide:

- a) the 1<sup>st</sup> page of this RFP signed with their legal name;
- b) the name of the contact person (provide also this person's mailing address, phone numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid.
- c) Resource Consent form completed and signed by each Resource (See Appendix 2)



## **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.

#### **4.1.1 Technical Evaluation**

Mandatory evaluation criteria are included in Appendix 1 – Evaluation Criteria.

### **4.2 Basis of Selection**

#### **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; and
  - c. obtain the required minimum of 40 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 65 points.
2. Bids not meeting (a) or (b) or (c) 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 70% for the technical merit and 30% 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 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
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 70/30 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

<b>Basis of Selection</b>			
<b>Highest Combined Rating Technical Merit (70%) and Price (30%)</b>			
	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>	115/135	89/135	92/135
<b>Bid Evaluated Price</b>	\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$
	<b>Pricing Score</b>	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27$
<b>Combined Rating</b>	84.18	73.15	77.70
<b>Overall Rating</b>	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.

#### 5.1.2. Aboriginal Designation

Who is eligible?

- a. An Aboriginal business, which can be:
  - i. a band as defined by the Indian Act
  - ii. a sole proprietorship
  - iii. a limited company
  - iv. a co-operative
  - v. a partnership
  - vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

- b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The supplier must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.



- Our Company is NOT an Aboriginal Firm
- Our Company is an Aboriginal Firm, as identified above.

## 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 [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 Contractor must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

All applicants, regardless of their status under the policy, must have the following information at the time to participate in a procurement process:

- Suppliers that are corporate entities, including those bidding as joint ventures, must provide a complete list of the names of all current directors or, for a privately owned corporation, the names of the owners of the corporation;
- Suppliers bidding as sole proprietors, including sole proprietors bidding as joint ventures, must provide a complete list of the names of all owners;
- Suppliers that are a partnership do not need to provide a list of names.

Supplier's Legal Name: \_\_\_\_\_

OR

Name of each member of the joint venture:

Member 1: \_\_\_\_\_

Member 2: \_\_\_\_\_

Member 3: \_\_\_\_\_

Member 4: \_\_\_\_\_

### Organizational Structure:

- corporate entity (shareholders) - provide the names of the current Board of directors
- privately owned corporation - provide a list of the owner's names
- sole proprietor - provide a list of the owner's names

### LIST OF NAMES

LAST NAME	FIRST 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 prior to contract award**

**5.2.3.1 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.

**5.2.4 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.

**5.2.5. Former Public servant**

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

**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.



## 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 Requirements

The Contractor must perform the Work in accordance with the Statement of Work at Annex A and the Contractor's technical bid, 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

[2010B](#) (2022-12-01), General Conditions - Medium Complexity – Professional 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)]

#### 7.2.2 Supplemental General Conditions

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

[4007](#) (2022-12-01), Canada to Own Intellectual Property Rights in Foreground Information apply to and form part of the 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, 2025 inclusive.

### 7.5 Authorities

#### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Julia Pace  
Title: Procurement Specialist  
Organization: Natural Resources Canada  
Address: 1 Challenger Drive, Dartmouth, Nova Scotia  
Telephone: 902-719-4856  
E-mail address: [Julia.pace@nrcan-rncan.gc.ca](mailto:Julia.pace@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 Price, Firm Unit Price(S) or Firm Lot Price(s)**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex B for a cost of \$ \_\_\_\_\_ *insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.



### 7.7.3 Method of Payment

#### Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

### 7.8 Invoicing Instructions

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

E-mail:

[Invoicing-Facturation@nrcan-mcan.gc.ca](mailto:Invoicing-Facturation@nrcan-mcan.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 filled out 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 Quebec.

### 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 supplemental general conditions 4007 (2022-12-01) Canada to own intellectual property rights in Foreground information;
- c) the general conditions 2010B, (2022-12-01) Professional Service (medium complexity);
- d) Annex A, Statement of Requirements;



- e) Annex B, Basis of Payment;
- f) the Contractor's bid dated \_\_\_\_\_, (to be filled out at contract award)

#### **7.12 Foreign Nationals (Canadian Contractor *OR* Foreign Contractor)**

*SACC Manual* clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor) or  
*OR*

*SACC Manual* clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

#### **7.13 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.

#### **7.14 Dispute Resolution**

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



## ANNEX A STATEMENT OF WORK

### SW.1.0 TITLE: Update to Energy Management Information System (EMIS) Guidelines

#### SW.2.0 BACKGROUND

The Industrial Division (ID) of Natural Resources Canada (NRCan) promotes the use of EMIS in industry to improve its energy performance. Energy management is crucial for organizations seeking to optimize energy consumption, reduce costs, and minimize their environmental impact. The use of an EMIS as a performance management system enables organizations to plan, make decisions, and take action to manage energy use and costs, and hence play a pivotal role in achieving energy performance improvements. These activities are in line with the responsibilities of the Office of Energy Efficiency (OEE) of NRCan to support the Canadian industry to improve their energy performance, reduce their carbon footprints, and contribute to Canada's Net Zero emission target by 2050.

In 2004, the Canadian Industry Partnership for Energy Conservation (CIPEC) published a manual called Energy Management Information Systems - Achieving Improved Energy Efficiency which gives a structured and practical understanding of an EMIS as an integral part of a company's energy management program. The Province of New Brunswick subsequently used this manual as the basis for designing a customized industrial program targeting the province's largest industrial facilities. Building on New Brunswick's experience, NRCan mandated Efficiency New Brunswick in 2010 to develop the manual entitled Energy Management Information Systems - Planning Manual and Tool in collaboration with provincial and territorial governments. This manual has become the reference used by industry for implementing both an EMIS and ISO 50001. Development of the EMIS concept of energy management has advanced in Canada such that the EMIS manual is now out-of-date. Technological achievements in the fields of measurement, control, data science, data management, and artificial intelligence have made the contents in the original manual out-of-date and in need of significant updates. While this new updated guideline will be based on the current edition of the NRCan guidelines, it will explore the existing landscape of EMIS, including the latest advancements, industry standards, and innovative approaches to EMIS such as focusing on operational control savings to eliminate waste.

Unlike the standards related to energy management systems, there are no international guidelines for the implementation of an EMIS. Moreover, there are no certification audits performed to evaluate the success of organizations in implementing an EMIS. This provides Canada and NRCan the opportunity to play a critical leadership role in the activities related to an EMIS, as well as in the integration of an EMIS with an energy management system (EnMS), such as ISO 50001 or Superior Energy Performance (SEP).

#### SW.3.0 OBJECTIVES

This SoW outlines the scope and requirements for delivering up-to-date, comprehensive, and stand-alone EMIS Guidelines in collaboration with the contractor. The primary objectives include:

- Assemble a working group comprised of experts in the development and use of EMIS.
- Organize meetings and lead the working group in the discussion of issues that need to be addressed as part of the focus on the update of NRCan's EMIS Guidelines. At minimum, this will include:
  - Updating EMIS Guidelines content (e.g., revise the use of cost centre controls to effect energy savings to the current philosophy to focus on operational control savings to eliminate waste).
  - Updating EMIS Guidelines structure, for example, to better align with organizations that may also choose to implement an EnMS, such as ISO 50001 before, at the same time, or after implementing an EMIS. This also includes consideration of re-structuring EMIS Guidelines contents to simplify digitalizing it into a step-by-step/Navigator tool format as part of future work. At minimum, this will include a stepwise implementation approach with concrete industrial examples for EMIS implementation.
  - Update EMIS guidance to integrate environmental performance metrics such as greenhouse gas (GHG) emissions (related to their energy use only) into an EMIS. The inclusion of GHG





indicators will be limited to scope 1 emissions in this study and be later expanded to scope 2 in a future phase (not included in the scope of this study).

- Development of a post-EMIS implementation audit process to determine if an organization complies with the NRCan EMIS Guidelines and supports the recognition process.
  - Establish a framework for NRCan to evaluate and account for the EMIS implementations following the updated guidelines. The purpose is to be able to evaluate the efficacy of the guidelines and their facilitative capacities for EMIS implementations.
  - An updated crosswalk of EMIS implementation with Strategic Energy Management (SEM) and EnMS implementations. At minimum, this will include how to best integrate an EMIS with SEM or EnMS and an overview of why an organization that already has an EnMS implemented may choose to implement an EMIS to improve the effectiveness of their EnMS, as well as, why an organization that implements an EMIS may choose to implement an EnMS as a next step.
  - Further research, analysis, and engagement to identify best practices, techniques, and technologies for EMIS implementation. This includes a comprehensive overview of EMIS, covering its evolution, key components, and emerging trends. Where applicable, it is important to highlight the changes or improvements as compared to the previously established framework. Engage with key industry experts, stakeholders, and professionals to gain insights into industry-specific challenges, opportunities, and emerging trends related to EMIS. Summarize a list of best practices in EMIS implementation as well as day-to-day operations including but not limited to data accuracy, security, integration with existing systems, etc. This also includes a list of best technologies as they relate to monitoring, the development of hardware and software to support an EMIS, etc. Report on the most recent methods and techniques for energy management including monitoring, verification, and reporting (MV&R), corrective actions, and preventive maintenance.
  - Include case studies showcasing successful and recent EMIS implementations (last 15 years) across different industries that include actual energy, GHG, and/or cost-saving information. Regarding unsuccessful/incomplete implementations, it is also important to highlight the common pitfalls to avoid in EMIS establishment as well as the countermeasures to take.
  - Provide actionable recommendations and updated guidelines for industrial facilities and/or organizations to self-audit their energy performance (potential ROI analysis and cost-benefit assessments), and plan, implement, and sustain an EMIS. The recommendations should reflect the POV of both program delivery agents (Utility, government, etc.) as well as that of the industry. Following the implementation of EMIS, the facility/organization will be ideally able to self-audit the system in place and check for compliance with the established framework.
- Prepare minutes to capture the discussions and agreements of each working group meeting. The minutes will be distributed to the working group members in advance of the next scheduled meeting and used to facilitate future discussions.
  - Manage the working group to achieve consensus on matters pertaining to updated EMIS Guidelines.
  - Prepare updated EMIS Guidelines upon the agreements recorded in the minutes and the discussions of the working group meetings. Distribute the draft EMIS Guidelines to the working group members for final comments. Considering the final comments, prepare a final EMIS Guidelines document.
  - Schedule a meeting with NRCan representatives to present the final working draft of the EMIS Guidelines and make recommendations for the next steps to promote this document.
  - Provide final supplemental documents to support the uptake of the new updated EMIS Guidelines, including at minimum, a Transition Guide from the older version of the guidelines to the updated one and Training Module.
  - Provide all project information collected (e.g., survey responses, industrial facility case studies and energy performance improvement, etc.)

In addition to addressing the primary objectives provided below, the contractor is encouraged to provide additional valuable insights and recommendations that can enhance the report's overall quality.



## SW.4.0 SCOPE OF WORK

The Contractor shall perform the following tasks to fulfill the objectives outlined above:

Task		Description
1	Working group activities	<ol style="list-style-type: none"> <li>1. Assemble a working group comprised of experts in the development and use of EMIS which convenes as required by the consultant during the entire course of the project.</li> <li>2. Organize and lead the working group in activities related to updating EMIS guidelines, including updating content, structure, and recommendations (incorporating energy related GHG emissions, post-EMIS implementation audit process, NRCan framework for EMIS evaluations).</li> <li>3. Organize and lead discussions on the crosswalk of EMIS implementation with SEM and EnMS implementations.</li> <li>4. Conduct decision-making panels for matters requiring consensus among the working group members.</li> <li>5. Prepare and distribute minutes of the discussions and related working documents to the members.</li> </ol>
2	Literature review	<ol style="list-style-type: none"> <li>1. Comprehensive overview of EMIS, key components, types, trends, and evolution.</li> <li>2. Summarize recent technological advancements in all elements of EMIS such as meters, sensors, and instruments, monitoring and control systems (DCS, SCADA), data historians, decision support, and reporting tools from industry reports, journals, and patents.</li> <li>3. Investigate and report on emerging technologies, such as Industrial Internet of Things (IIoT) integration, artificial intelligence (AI), etc., and their potential impact on the future of EMIS.</li> <li>4. Compare various EMIS solutions including but not limited to features and functionalities, scalability and adaptability to different operating and organizational needs, integrability to existing management systems, ease of implementation, and cost-effectiveness.</li> <li>5. Data analysis detailing findings related to energy consumption patterns, savings, and/or emission reductions collected from existing EMIS implementations.</li> <li>6. Draft a first progress deliverable (report, presentation, etc.) on key findings. Include these findings in the final report.</li> </ol>
3	Gap assessment of existing guideline	<ol style="list-style-type: none"> <li>1. Review the existing EMIS manual and tool and identify areas in need of updating based on the acquired information in the previous tasks/activities.</li> </ol>
4	Industry surveys and interviews	<ol style="list-style-type: none"> <li>1. Design a well-structured survey questionnaire with a combination of close-ended and open-ended questions to gather relevant information from experts and stakeholders.</li> <li>2. Compile a list of target experts with existing EMIS implementation experience as well as interested parties.</li> <li>3. Engage with key experts and stakeholders to compile industry-specific insights on different MV&amp;R techniques, challenges, opportunities, and emerging trends in EMIS. The format of the contacts (email, phone, etc.) will remain at the discretion of the Contractor. This activity could feed the data analysis in the literature review task.</li> <li>4. Record raw survey response data from the participants for further analysis down the road.</li> <li>5. Where applicable, inquire about the enterprise/corporate vision for EMIS as opposed to local and sporadic implementations.</li> </ol>



		<ol style="list-style-type: none"> <li>6. Combine industry-specific trends (to predict future potential interest in EMIS) with a comparative analysis comparing insights across different industry segments and regions, and highlighting variations, similarities, and differences.</li> <li>7. Draft a progress deliverable (report, presentation, etc.) summarizing the analysis of survey response data and quantitative/qualitative findings. To add depth and credibility to the report, it is important to include notable quotes and insights, as well as interview transcripts.</li> <li>8. Include key findings in the final report.</li> </ol>
5	Benchmarking and case studies	<ol style="list-style-type: none"> <li>1. Following the previous activity, compile several case studies including successful and less successful industrial examples of EMIS implementations.</li> <li>2. Include information such as industry sector and/or organization type, EMIS solution and type used, performance metrics considered, regulatory landscape, challenges encountered, benefits achieved, and lessons learned.</li> <li>3. Include recommendations on best practices and available techniques based on the case studies.</li> <li>4. Finalize the list of case studies to be included in the final report.</li> </ol>
6	Recommendations	<ol style="list-style-type: none"> <li>1. Provide actionable recommendations and guidelines for industrial facilities and/or organizations to self-audit their energy performance.</li> <li>2. Based on the gap assessment in the previous activity, define a systematic, detailed, and updated methodology for EMIS pre-audit, audit, and implementation.</li> <li>3. Provide practical recommendations for continuous upkeep and maintenance of EMIS to make it sustainable and resistant to organizational and operational changes.</li> <li>4. Establish a framework for NRCan to trace, evaluate, and account for EMIS implementations following its updated guidelines. This may or may not be included in the final report.</li> <li>5. Include key findings in the final report.</li> </ol>
7	Draft final report	<ol style="list-style-type: none"> <li>1. Propose updated EMIS Guidelines upon the agreements recorded in the minutes and the discussions of the working group meetings.</li> <li>2. Present and validate the outline for the final report.</li> <li>3. Compile all findings in a final report including the most recent guidelines on EMIS. See Section 5 for more details on all the deliverables.</li> </ol>
8	Draft supplemental documents	<ol style="list-style-type: none"> <li>1. Prepare final supplemental documents to support the uptake of the new updated EMIS Guidelines, including at minimum, a Transition Guide and Training Module.</li> </ol>

#### SW.4.1 Deliverables, Milestones and Schedule

The contractor will deliver the following:

Deliverable		Description	Deadline
A	Literature review	<ul style="list-style-type: none"> <li>• Deliverable A-1 in a mutually agreed-upon format (report, presentation, etc.) on the following topics:               <ul style="list-style-type: none"> <li>○ Overview of EMIS and its components</li> <li>○ Recent advancements in EMIS and emerging technologies and practices (MV&amp;R, IIoT, AI, etc.)</li> <li>○ Comparison of different EMIS types and solutions</li> <li>○ Data analysis on existing EMIS implementations (available from the review)</li> </ul> </li> </ul>	June 26, 2024



	Summary of current manual content and gap assessment	<ul style="list-style-type: none"> <li>Deliverable A-2 is a comprehensive review of manual and supporting documents in a table format.</li> <li>Deliverable A-3 is the identification of areas in need of updating based on the acquired information in the previous tasks/activities in a table format.</li> </ul>	June 26, 2024
B	Industry surveys and interviews	<ul style="list-style-type: none"> <li>Deliverable B-1 in a mutually agreed upon format (report, presentation, etc.) on the survey questionnaire to gather relevant information from experts and stakeholders.</li> </ul>	July 5, 2024
		<ul style="list-style-type: none"> <li>Deliverable B-2 in a mutually agreed-upon format (report, presentation, etc.) on the following topics:                             <ul style="list-style-type: none"> <li>Insights on different MV&amp;R techniques, challenges, opportunities, and emerging trends in EMIS</li> <li>Where applicable, enterprise/corporate vision for EMIS</li> <li>Industry-specific trends with a comparative analysis with various differentiators</li> <li>Notable quotes from experts.</li> </ul> </li> </ul>	August 23, 2024
		<ul style="list-style-type: none"> <li>Deliverable B-3 on raw survey response data in a mutually agreed upon format (report, presentation, etc.)</li> </ul>	
C	Report Structure	<ul style="list-style-type: none"> <li>Deliverable C-1 is the recommended outline and structure of the final report (Deliverable D-1) in the format of a Word document to be validated by NRCan. This should also include a summary of how the EMIS Guidelines could in the future be integrated into a step-by-step tool digital format.</li> </ul>	September 6, 2024
	NRCan Presentation	<ul style="list-style-type: none"> <li>Deliverable C-2 is a PowerPoint presentation to NRCan to present the proposed report structure and the current state of the draft EMIS Guidelines.</li> </ul>	September 13, 2024
	Draft Report	<ul style="list-style-type: none"> <li>Deliverable C-3 is the draft EMIS Guidelines in the format of a Word document to be validated by NRCan.</li> </ul>	October 4, 2024
D	Final Report	<ul style="list-style-type: none"> <li>Deliverable D-1 is the final report that will include the entire findings of the Contractor's mandate and serve as the updated guidelines on EMIS.</li> </ul>	December 20, 2024
		<ul style="list-style-type: none"> <li>Deliverable D-2 is a final PowerPoint presentation to NRCan on the final report.</li> </ul>	January 6, 2025
	EMIS Crosswalk Document	<ul style="list-style-type: none"> <li>Deliverable D-3 is an EMIS crosswalk document that supports the integration of EMIS with a recognized EnMS, such as ISO 50001, etc.</li> </ul>	January 20, 2025
	Transition Guide	<ul style="list-style-type: none"> <li>Deliverable D-4 is a Transition Guide that highlights the key changes needed for an organization that has used the previous guidelines for its EMIS implementation and now needs to comply with the updated guidelines.</li> </ul>	February 10, 2025
	Training Module	<ul style="list-style-type: none"> <li>Deliverable D-5 is an updated Training Module to guide users through the application of the updated EMIS guidelines.</li> </ul>	March 3, 2025



## **SW.4.2 Method and Source of Acceptance**

Upon receipt of the deliverables, NRCan will review the documents to ensure they meet the outlined objectives. Any necessary revisions shall be completed within a maximum period of three (3) weeks.

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.

## **SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW**

### **SW.5.1 Contractor's Obligations**

The Contractor is to:

- Coordinate with NRCan on the progress in all the tasks and activities mentioned in this SoW.
- Coordinate all the activities related to the working group, including managing working sessions and decision-making panels.
- Deliver the deliverables within one week of the mentioned deadlines in this SoW unless approved by NRCan.
- Assign a point of contact/project manager for coordination purposes and notify NRCan of any changes in the availability of the personnel assigned to the project.
- Notify NRCan of any potential changes in the scope or activities that might deviate from the agreed-upon items in this SoW.
- Provide updates on the work progress in monthly meetings.
- Provide companies with non-disclosure agreements if necessary.
- Attend meetings with stakeholders if necessary.

### **SW.5.2 NRCan's Obligations**

NRCan is to:

- Provide reasonable access to the project authority, who will be available to coordinate activities.
- Provide comments on draft reports within 10 working days.
- Provide support in creating the expert working group (e.g., by providing the contractor with invitation letters to key stakeholders) and consult with other government divisions and utility providers as required.
- Consult with industry associations and industrial facilities as required.
- Provide other assistance or support as required.
- Ensure that no document deemed Protected (or higher) be shared with the contractor.

Natural Resources Canada is committed to making our Department more inclusive for everyone and fostering an equitable workplace culture that values diversity and creates an environment that is welcoming and rewarding for all. We encourage the businesses that work with us to reflect these values. More information can be found at:

<https://www.canada.ca/en/government/publicservice/wellness-inclusion-diversity-public-service/diversity-inclusion-public-service2.html>

### **SW.5.3 Estimated Period of the Contract**

The estimated period of the contract is from the date of Contract Award to March 31st, 2025, following the approval of the final deliverable (D-5).



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

Work to be performed on contractor's premises and no travel is involved.

#### **SW.5.5 Language of Work**

All the communications with NRCan, as well as the deliverables by the consultant, should be in either English or French. The working group activities should be conducted in the preferred language of the group, which is to be established after the date of Contract Award. The Industrial Surveys and Interviews should be prepared and conducted in either or both official language(s) depending on the participants' preference.



## 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

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals which fail to meet the mandatory criteria will be deemed non-responsive.

Criterion ID	Mandatory Criterion	Compliant (Yes/No)	Reference to Bidder's Response
<b>ORGANIZATION</b>			
<b>M1</b>	The bidder <b>must</b> have performed a minimum of fifty (50) EMIS audits (to be listed by the bidder) within the last twenty (20) years.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M2</b>	The bidder <b>must</b> have a minimum of ten (10) years of experience as of the posting date of this RFP guiding industrial organizations in implementing Energy Management Information Systems (EMIS) AND Energy Management Systems (EnMS).	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M3</b>	<p>The bidder <b>must</b> have experience in implementing an EMIS, in accordance with EMIS Guidelines, on a minimum of twenty (20) industrial sites. A list of sites must be included in the bidder's bid.</p> <p>This includes the development of business cases, production of models, gap assessments, and energy management plans for each site, and leadership in implementing energy management practices.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>M4</b>	The bidder <b>must</b> have performed measurement, verification, and reporting organizational energy savings using recognized measurement and verification protocols, such as the <a href="#"><u>International Performance Measurement and Verification Protocol (IPMVP)</u></a> , <a href="#"><u>Superior Energy Performance M&amp;V Protocol (SEP M&amp;V)</u></a> , <a href="#"><u>California Industrial Strategic Energy Management</u></a>	<input type="checkbox"/> Yes <input type="checkbox"/> No	





	(SEM) M&V Guide, etc. for a minimum of ten (10) industrial sites (a list of sites must be included in the bidder's bid)		
M5	The bidder <b>must</b> have designed and delivered energy management programs for a minimum of five (5) entities, including governments (federal, provincial, municipal), utilities, or *funding organizations.  *A funding organization is any entity other than governments or utility providers providing funding for energy management programs, e.g., banks, non-profit sources, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M6	The bidder <b>must</b> have developed and updated a minimum of five (5) energy management standards, guidelines, and technical documents applicable to the industrial sector.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>INDIVIDUALS</b>			
M7	The proposed resource team <b>must</b> include at least one individual who is a Certified Practitioner in Energy Management Systems. A copy of the certificate must be provided with the bidder's bid.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M8	The bidder <b>must</b> submit a detailed CV for <b>each individual</b> who will be working on this project as the project manager or a primary team member and specify to which tasks <b>each individual</b> is to be assigned. The maximum allowable number of primary team members excluding the project manager is ten (10), each contributing to at least 10% of project tasks stated in the Statement of Work. The project manager is assumed to be involved in all the activities in a supervisory capacity.  CVs must include, at minimum, professional experience in month/year and education. The bidder is asked to highlight the experiences related to EMIS implementation projects for the project manager and each primary team member. Complete Resource Consent form in Appendix 2.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

## 1.2 RATED EVALUATION CRITERIA

The criteria contained herein will be used by NRCan to evaluate each proposal that has met all of the mandatory criteria. Proposals will be evaluated based on the following criteria:

Req. #.	Point Rated Technical Criteria	Max. points	Bid points received	Proposal Page #
R1	<p><b>Points will be awarded for experience over the minimum mandatory 20 (20) industrial sites where the bidder has implemented EMIS in accordance with EMIS Guidelines as required in M3.</b></p> <p>This includes the development of business cases, production of models, gap assessments, and energy management plans for each site, and leadership in implementing energy management practices. Up to twenty (20) points will be awarded.</p> <ul style="list-style-type: none"> <li>• 21 – 30 industrial sites – (5 points)</li> <li>• 31 – 40 industrial sites – (10 points)</li> <li>• 41 – 50 industrial sites – (15 points)</li> <li>• 51 or more industrial sites – (20 points)</li> </ul>	20 points		



Req. #.	Point Rated Technical Criteria	Max. points	Bid points received	Proposal Page #
R2	<p><b>The bidder's experience with NRCan's EMIS guidelines.</b> In this criteria, the bidder's direct experience with NRCan's EMIS guidelines is rated against the requirements of the mandate. Up to fifteen (15) points will be awarded in case of multiple experiences.</p> <p>Direct experience with the guidelines does not involve its utilization and include:</p> <ul style="list-style-type: none"> <li>• The bidder trained staff to support the use and uptake of NRCan's EMIS Guidelines. (5 points)</li> <li>• The bidder developed training materials based on NRCan's EMIS guidelines. (5 points)</li> <li>• The bidder was involved in the development of earlier editions of NRCan's EMIS Guidelines – (5 points)</li> </ul>	<b>15 points</b>		
R3	<p><b>The bidder's experience designing and delivering EMIS programs for different organizations, as presented in M5.</b> Further to the number of programs delivered for different organizations, the diversity of the bidder's client portfolio is critical for developing a Canadian national guideline. Points can be summed up, and a maximum of ten (10) points will be awarded for the most diverse portfolio.</p> <ul style="list-style-type: none"> <li>• Governments (federal, provincial, municipal); (4 points)</li> <li>• Utilities; (4 points)</li> <li>• Funding organizations – (2 points)</li> </ul>	<b>10 points</b>		
R4	<p><b><u>Diversity</u></b> The Bidders should demonstrate the following corporate activities they have implemented to promote anti-racism and diversity within their organisation:</p> <ol style="list-style-type: none"> <li>a) The bidder has internally published policies or commitments on anti-racism and inclusiveness;</li> <li>b) The bidder has publicly available organisational commitments to a diverse workforce;</li> <li>c) The bidder's employees are mandated to take mandatory training on anti-racism</li> <li>d) The bidder's employees are mandated to take unconscious bias training;</li> <li>e) The bidder has developed internal staffing and/or recruitment strategy(ies) to increase representation of underrepresented groups in their workforce.</li> </ol> <p>The bidder should provide details of the following activities.</p> <p>For activities described in a. and b. (policy and commitments), the bidder should provide copies of policy or commitment documents including their effective date.</p> <p>For activities described in c. and d. (training), the bidder should provide the name of the course and the service provider; if developed internally, a copy of the course outline.</p>	<b>10 points</b>		



Req. #.	Point Rated Technical Criteria	Max. points	Bid points received	Proposal Page #
	<p>For activities described in e. (staffing), the bidder should provide copies of job posting, or other staffing/recruitment documents demonstrating compliance with the rated criteria.</p> <p><b>Maximum 2 points for each activity addressed. 0 pts for each activity not addressed.</b></p>			
<b>R5</b>	<p><b>The proposed individual resource experience with EMIS implementation projects as presented in M8.</b></p> <p>For this rated criteria, teams of varying sizes and collective strengths in terms of EMIS implementations are quantitatively evaluated. In this assessment, large teams with lower individual EMIS experience could compete with smaller teams with higher EMIS experience.</p> <p>The bidder should identify the fraction or percent of the work to be accomplished by each primary team member proposed for this project, excluding the project manager. See the example in Table 1.3 below.</p> <p>The bidder will be awarded points for the number of EMIS implementation projects that each primary team member (whose contribution to this project is elaborated in Table 1.3), excluding the project manager. See Table 1.4 as an example of how the ratings are performed.</p> <p>Up to maximum of ten (10) points will be awarded.</p>	<b>10 points</b>		
<b>Total Points needed to be considered compliant</b>		<b>40</b>		
<b>Total Points available</b>		<b>65</b>		

**Table 1.3 - The Percentage of the Overall Project Effort Performed by Each Primary Team Member Excluding the Project Manager**

Primary Team Member (up to a maximum of ten (10))	Percentage of the overall project effort (at least 10%)
	<p>Project Tasks:</p> <ol style="list-style-type: none"> <li>1. Working group activities</li> <li>2. Literature review</li> <li>3. Gap assessment of existing guideline</li> <li>4. Industry surveys and interviews</li> <li>5. Benchmarking and case studies</li> <li>6. Recommendations/Audits</li> <li>7. Draft final report</li> <li>8. Draft supplemental documents</li> </ol>
Joe Smith	30%
Jane Doe	10%
Ray Bob	60%
<b>TOTAL</b>	<b>100%</b>

**Table 1.4 - Assessment of team experience per criteria**

(To be assessed by bid evaluation team based on CVs and data provided in Table 1.3)



<b>Primary Team Members</b>	<b>R4</b>  (Number of EMIS implementation projects for each primary team member) * Excluding the project manager
Joe Smith (JS)	12
Jane Doe (JD)	5
Ray Bob (RB)	8
<b>Total Points</b>	JS: 30% (participation of JS in the overall project tasks as per Table 1.3) x 12 + JD: 10% x 5 + RB: 60% x 8 =8.9
<b>Maximum</b>	10
<b>Received points</b>	8.9



## APPENDIX 2 – RESOURCE CONSENT FORM

Required at bid closing for each resource proposed.

I, \_\_\_\_\_, (*insert resource name*) herein certify that I am aware, have reviewed the responses to the technical criteria and confirm the information is accurate, and I have given consent to \_\_\_\_\_ (*insert Supplier's name*), to submit my name in response to the RFP no. NRCan – 5000078010.

\_\_\_\_\_  
Resource Signature

\_\_\_\_\_  
Date



**APPENDIX 3 – FINANCIAL BID**

**1. Firm Price - Milestone Payments**

Bidder tendered all-inclusive firm price to perform the work is in Canadian funds, applicable taxes excluded. Any Travel and Living Expenses and other miscellaneous expenses must be included in the firm price.

**The bidder must complete the schedule below indicating the firm proposed amounts for each step according to the indicated percentages.**

<b>Milestone #</b>	<b>Description of Milestone</b>	<b>Payment date</b>	<b>Firm Price (Applicable Taxes Excluded)</b>
<b>1</b>	<i>Working group activities and Literature review (following delivery and acceptance by the Project Authority of Deliverable A-1 of the SoW)</i>	June 26, 2024	\$ _____ 30%
<b>2</b>	<i>Gap assessment of existing guideline (following delivery and acceptance by the Project Authority of Deliverables A-2 and A-3 of the SoW), Industry surveys and interviews, and Benchmarking &amp; Case studies (following delivery and acceptance by the Project Authority of Deliverables B-1, B-2, and B-3)</i>	September 8, 2024	\$ _____ 25%
<b>3</b>	Recommendations and final report (following delivery and acceptance by the Project Authority of Deliverables C-1, C-2, C-3, D-1, and D-2 of the SOW)	January 6, 2025	\$ _____ 32%
<b>4</b>	Draft supplemental documents (following delivery and acceptance by the Project Authority of Deliverables D-3, D-4 and D-5 of the SoW)	March 11, 2025	\$ _____ 13%
<b>Total Firm Price for Financial Proposal Evaluation:</b>			\$ _____ <b>100%</b>