

May 23, 2023

Standards Council of Canada  
55 Metcalfe Street, Suite 600  
Ottawa ON K1P 6L5  
Canada

**Subject: Request for Proposal (RFP) # 2023-03  
National Workshop Agreement for the integration of mental health and  
substance use health services in primary care settings.**

This document represents an invitation to Bidders to submit their proposals to the Standards Council of Canada (SCC) to develop of a National Workshop Agreement (NWA), in English and French, that will provide guidance and best practices to improve the integration of mental health and substance use health services in primary care settings.

In accordance with the Statement of Work attached hereto as Appendix "B", SCC will issue a contract to the successful Bidder, establishing the pricing and terms / conditions under which the project will be undertaken.

Proposals must be received by SCC no later than **16:00 hours, (4 p.m.) EDT on Tuesday June 20<sup>th</sup>, 2023**. It is the Bidder's responsibility to deliver their proposal prior to **the time/date of bid closing**. Proposals received after 16:00 hours will not be accepted; they will be returned to the sender unopened.

**PROPOSALS ARE TO BE SUBMITTED ELECTRONICALLY TO [contracts@scc.ca](mailto:contracts@scc.ca)** by the time/date of bid closing (including the financial proposal).

**1. ATTACHMENT 1 – Technical Proposal**

*NOTE: No financial information is to be included in ATTACHMENT 1*

**2. ATTACHMENT 2 – Financial Proposal**

**Proposals that do not contain the requested documentation or deviate from the required financial format (as per Appendix D of SCC RFP #2023-03) may be considered incomplete and disqualified.**

**SCC is not obliged to accept the lowest bid and/or any proposal.**

Questions with respect to the meaning or intent of this process, or requests for correction to any apparent ambiguity, inconsistency or error in the document must be submitted in writing to [contracts@scc.ca](mailto:contracts@scc.ca) and must be received by 12:00 hours (noon) EDT on **Friday, June 9<sup>th</sup>, 2023**. All answers will be communicated to all potential bidders via email.

**Request for Proposal # 2023-03**

**List of documents:**

**APPENDIX A: REQUEST FOR PROPOSAL – ACCEPTANCE FORM**

**APPENDIX B – STATEMENT OF WORK**

**APPENDIX C – TECHNICAL EVALUATION CRITERIA**

**APPENDIX D - FINANCIAL PROPOSAL**

**APPENDIX A: REQUEST FOR PROPOSAL – ACCEPTANCE FORM**

**Proposal Submitted by**

\_\_\_\_\_  
**(Name of Company)**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
**(Complete Address)**

**GST/HST Number** \_\_\_\_\_ **BIN Number** \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Contact Email Address: \_\_\_\_\_

1. The Undersigned (hereinafter referred to as “the Bidder”) hereby proposes to the Standards Council of Canada (SCC) to furnish all necessary expertise, supervision, materials, equipment and other incidentals necessary to complete to the entire satisfaction of SCC or their authorized representative, the work described in the Statement of Work attached hereto as Appendix “B”.
  
2. The Bidder hereby proposes to perform and complete the work in accordance with the terms and conditions (at the place and in the manner) specified in:
  - (i) Appendix A - attached and entitled “Request for Proposal – Acceptance Form;”
  - (ii) Appendix B - attached and entitled “Statement of Work”;
  - (iii) Appendix C - attached and entitled “Technical Evaluation Criteria”;
  - (iv) Appendix D - attached and entitled “Financial Proposal”; and
  
3. **Period of Services**
  - (i) The contract award date is the date that the contract is signed by the Bidder and SCC.
  - (ii) The service start date is the date that the Bidder and SCC agree to commence the work.
  - (iii) The Bidder hereby proposes to perform the work commencing on the service start date and have work completed as established in Appendix B.

**4. Financial Proposal**

The Bidder hereby proposes to perform and complete the work as per the financials outlined in Appendix D: Financial Proposal of SCC RFP #2023-03, which represents the total financial proposal.

**5. Optional Modifications**

In the event that SCC requests the successful Bidder to proceed with any optional modifications or additional changes to the process, payment for this additional work will be based on the per diem rates quoted (see Appendix D of SCC RFP #2023-03).

Authorization to proceed with additional work will be provided by way of a contract amendment as per the established proposal.

## **6. Optional Years**

SCC may decide, at its discretion, to exercise an option by means of formal contract amendment, to extend the term.

## **7. Federal Goods and Services Tax (GST) and Harmonized Sales Tax (HST)**

The prices and rates quoted as part of the Bidder's proposal are NOT to include any provision for taxes.

## **8. Payment Schedule**

As a result of acceptance of the Bidder's proposal, SCC reserves the right to negotiate an acceptable payment schedule prior to the awarding of a contract and/or any amendments.

## **9. Appropriate Law**

Any contract awarded by SCC as a result of SCC RFP #2023-03 shall be governed by and construed in accordance with the laws in force in the Province of Ontario, Canada.

## **10. Tender Validity**

The Bidder agree(s) that their proposal will remain firm for a period of 90 calendar days after the **the time/date of bid closing**.

## Signatures

The Bidder herewith submits this bid in accordance with the requirements specified in the Request for Proposal documents.

SIGNED this \_\_\_\_\_ day of \_\_\_\_\_, 2023

Per \_\_\_\_\_  
NAME OF COMPANY

Per \_\_\_\_\_  
(Signing Officer and Position)

Per \_\_\_\_\_  
(Signing Officer and Position)

## **APPENDIX B – STATEMENT OF WORK**

## APPENDIX B: STATEMENT OF WORK

<p><b>Project</b></p>	<p>The Standards Council of Canada (SCC) will issue one (1) contract for the development of a National Workshop Agreement (NWA), in English and French, that will provide guidance and best practices to improve the integration of mental health and substance use health services in primary care settings.</p>
<p><b>Background</b></p>	<p>Standards Council of Canada (SCC) is a Crown Corporation responsible for promoting standardization in Canada. Its mandate is to promote efficient and effective voluntary standardization in Canada, where standardization is not expressly provided for by law.</p> <p>Health Canada (HC) has identified six Mental Health and Substance Use Health (MHSUH) priority topics and requires the publication of national standardized guidance on these topic areas that is developed through a consensus-based process with input from affected interested parties, and that is implementable by authorities having jurisdiction, health care organizations, and individual providers.</p> <p>To support this work, SCC will leverage the national standards system to deliver the required national standardized guidance and to advance national consensus on standards for MHSUH services. This National Workshop Agreement (NWA) will be one of the six integrated standards-based deliverables of national scope, that will be provided.</p> <p><u>Purpose</u></p> <p>As the first point of contact for health services for the majority of Canadians, improving the quality, accessibility, and types of MHSUH services offered by primary care providers is expected to have improved patient outcomes. Primary care services are tailored to the community they serve. A service or support that is appropriate for one community may not be relevant to another. In addition, due to increasing demands for MHSUH services in primary care settings, it is critical to increase the capacity for multidisciplinary approaches to meet this demand. This can be addressed by mapping the range of strategies for primary care capacity building, integration of MHSUH services into primary care, and the connection with population based digital MHSUH services. This information can be synthesized into a report and/or framework to provide guidance and inform models of care (e.g., stepped care; coordinated access) and future standardization efforts that take into account, equity for and Black Canadians, First Nations, Inuit, Metis, and people of color, in addition to gaps, needs and priorities of different jurisdictions in Canada.</p> <p>The SUPPLIER will engage relevant parties, including primary care providers and those with experience in MHSUH services to lead a consensus-based process to engage in, and develop the NWA, in accordance with <a href="#">SCC's National Workshop Agreement guidance</a>.</p>



	<p><u>Outcome</u></p> <p>The focus of this project is to improve the integration of MHSUH services in primary care settings through the guidance and best practices included in the NWA.</p> <p><u>Principles</u></p> <p>It is expected that the SUPPLIER will leverage and build on relevant existing standards and documentation in consultation with the expert group or committee.</p> <p>SCC acknowledges the current COVID-19 pandemic has forced the use of virtual/remote activity to ensure development operations can still be carried out. The SUPPLIER will be expected to leverage the virtual operating environment and available tools to develop the NWA.</p> <p><u>Timelines and Distribution</u></p> <p>Work is to begin at the effective date of the contract.</p> <p>The NWA shall be developed and published in accordance with the workplan schedule and will be provided simultaneously in English and French by February 29, 2024.</p> <p>To reduce the financial burden to interested parties, the NWA will be publicly available for viewing and downloading for a period of five (5) years, or the life of the edition, whichever comes latest, at no fee, in both of Canada’s official languages.</p> <p>Any and all Intellectual Property Rights (IPR) contained in the Deliverables shall be the property of the SUPPLIER. The SUPPLIER shall grant SCC and Health Canada a license to reproduce, in whole or in part, for non-commercial purposes, the Deliverable(s) outlined in the agreement.</p> <p>If the SUPPLIER determines that it will not proceed to participate in the related standards development activity, the SUPPLIER agrees that any and all IPR contained in the Deliverable(s) shall be the property of SCC, for the purpose of pursuing standardization goals.</p> <p>The SUPPLIER will retain the right to use the Deliverables and results for continued research and educational purposes without charge, fee, or royalties.</p>
<p><b>Scope</b></p>	<p>Development of a National Workshop Agreement (NWA) that provides guidance to improve the integration of MHSUH services in primary care settings, in English and French.</p> <p>Content will map the range of strategies for primary care capacity building, examine which MHSUH services can be better integrated with primary care (e.g., screening and brief intervention; referral to specialised services; medication management, including opioid agonist treatment; continuing care), strategies to advance that integration of MHSUH services with primary care, and the connection with population based digital MHSUH services. Content will provide guidance to inform future standardization efforts, taking into account equity for Black</p>

	<p>Canadians, First Nations, Inuit, Metis, and people of color, in addition to gaps, needs and priorities of different jurisdictions in Canada.</p> <p>Content will include guidance on key qualities for accessible mental health and/or substance use health options for integration within primary care settings, including but not limited to: stigma free; evidence informed; culturally safe and linguistically appropriate; equitable and inclusive, as well as incorporating anti-racism best practices.</p> <p>The NWA will include consideration and bridge any current gaps in existing relevant standardization solutions and community-based resources, to further address the qualities for accessible mental health and/or substance use health options for integration with primary care settings. This will include, but will not be limited to:</p> <ul style="list-style-type: none"> <li>• <a href="#">CAN/HSO 22004: 2023 Mental Health and Addictions Services (publication spring 2023)</a></li> <li>• <a href="#">CAN/HSO 34015:2020 Primary Health Care Services</a></li> <li>• <a href="#">CAN/HSO 76000:2021 - Integrated People-Centred Health Systems</a></li> <li>• <a href="#">Work led by the Canadian Primary Care Research Network (CPCRN).</a></li> <li>• <a href="#">The Wellness Together Canada Model and documentation</a></li> <li>• <a href="#">Canadian Association of Mental Health, Mental Health and Primary Care Policy Framework</a></li> <li>• <a href="#">Mental Health Commission of Canada, Structural Stigma in Health Care for Mental Health and Substance Use – Networking for the Design, Development, and Implementation of an Audit Tool</a></li> </ul> <p><u>Engagement</u></p> <p>It is expected that the SUPPLIER will seek to leverage Canadian expertise and ensure geographic and diverse representation. The SUPPLIER will be required to undertake outreach, public consultation and engagement with relevant parties, including those identified by SCC, such as, but not limited to: MHSUH Collaborative members; primary care clinic owners/operators; primary care physicians, nurse practitioners, nurses, and other medical staff; people with lived and living experience; Black, Indigenous and People of Colour (BIPOC) partners; LGBTQ+ partners; Indigenous partners; provincial and territorial health ministries; mental health and substance use health NGOs.</p> <p>This project would include a preliminary work plan that would inform future standards development work in the subject area.</p>
<p><b>Mandatory Requirements</b></p>	<p>The SUPPLIER:</p> <ul style="list-style-type: none"> <li>• Shall have a deep knowledge and experience in primary care services delivery and primary care models of care, including current issues faced in primary care;</li> <li>• Shall comply to <a href="#">SCC Guidance for National Workshop Agreement</a>; and</li> </ul>

	<ul style="list-style-type: none"> <li>• Acknowledges and accepts this statement of work (SOW) and all of the requirements pertaining to deliverables detailed within.</li> </ul>
<b>Tasks/Technical Specifications</b>	<p>This appendix contains detailed requirements about the work that is to be delivered by the SUPPLIER throughout the required Stages 1 through 6.</p> <p>End-project deliverable(s) shall constitute the publication of a National Workshop Agreement (NWA). The NWA shall be published simultaneously in English and French.</p> <p>The SUPPLIER will:</p> <ul style="list-style-type: none"> <li>• Form a project team with the technical and linguistic competency to handle the project management, participant management, and other activities as specified in the Deliverables section. The SUPPLIER will also identify at least one substitute (as backup support) with equal or higher technical competence to ensure project completion.</li> <li>• Submit all Contract-related deliverables directly to SCC, by email or an agreed upon electronic workspace, according to the authorized work plan and schedule;</li> <li>• Ensure SCC is informed as per the reporting schedule outlined in the Contract;</li> <li>• Manage the NWA development process and provide support (coordination and communication) to participants in accordance with the applicable <a href="#">SCC Requirements and Guidance for National Workshop Agreements</a>;</li> <li>• Inform and obtain SCC’s final approval on all joint press release communications;</li> <li>• Provide sufficient notice to SCC to review and approve any public, non-mandated announcements regarding work undertaken in relation to this project; specifically, the SUPPLIER to provide the following minimum notice to SCC: <ul style="list-style-type: none"> <li>○ SUPPLIER or Joint SUPPLIER-SCC Publication Content – minimum fifteen (15) business days; note that that the timeline is for SCC to approve the SUPPLIER content – with respect to Joint Publications, the publication issuance shall be at SCC’s final determination;</li> </ul> </li> <li>• Provide acknowledgement of the contribution of SCC and associated funders, to contribution of the development of the workshop agreement (including in publication and related announcements);</li> <li>• Inform and seek authorization from SCC of scope, work plan, budget and/or schedule changes;</li> <li>• Enable accessibility to the NWA;</li> <li>• Ensure appropriate documentation for the required development activity is maintained;</li> </ul>

	<ul style="list-style-type: none"> <li>NWA distribution reporting: For the first three (3) years following publication of the NWA, the Supplier is required to supply SCC annual reporting including number of visits (to view the agreement) and number of times the agreement is accessed (by download or online use) summarized by language of publication.</li> </ul>	
<b>Deliverables</b>	See the following deliverables table.	
<b>Stage</b>	<b>Guidance</b>	<b>Deliverable</b>
<b>Stage 1: Preparatory Work</b>	<p>a) The SUPPLIER shall conduct appropriate research/scanning to ensure available information and evidence is collected. The SUPPLIER shall describe the methods used to conduct research/scanning and provide a bibliography.</p> <p>b) The SUPPLIER shall ensure that appropriate engagement is conducted to secure key targeted stakeholders.</p> <p>c) The SUPPLIER shall ensure an “active offer” is made to ascertain the official language preference of stakeholders and ensure that the engagement is conducted pursuant to this preference.</p>	<p>a) Confirmation of the methods used for research/scanning and that the required research/scanning has been conducted.</p> <p>b) Confirmation that the required engagement has been conducted.</p> <p>c) Confirmation that language preferences were provided as identified through the “active offer”.</p>
<b>Stage 2: Proposal</b>	<p>a) The SUPPLIER shall document the need for the NWA, including but not limited to:</p> <ul style="list-style-type: none"> <li>Purpose and justification;</li> <li>Relevant documents;</li> <li>Lists of organizations that may be interested in participating in the project.</li> </ul> <p>b) Generate project work plan with clear deliverables and matching timelines for completion.</p> <p>c) Identify appropriate project scope (based on sponsor needs, standard landscape research, intended NWA application needs, such as certification).</p> <p>d) Conduct a coordination meeting with SCC and project sponsor (if any).</p> <p>e) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made.</p>	<p>a) Confirmation that the need has been identified.</p> <p>b) Obtain SCC approval of project work plan.</p> <p>c) Obtain SCC approval of the project scope.</p> <p>d) Confirmation coordination meeting was held.</p> <p>e) Confirmation that language preferences were provided as identified through the “active offer”.</p>

Stage	Guidance	Deliverable
	<p>f) The SUPPLIER shall document their evaluation and approval to proceed with the NWA.</p>	<p>f) Confirmation that required evaluation and approval has been conducted.</p>
<p><b>Stage 3: Workshop Awareness</b> (Guidance clauses 3.1, 3.2.1, 3.2.2)</p>	<p>a) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made to the workshop participants.</p> <p>b) The SUPPLIER shall proactively inform the key targeted stakeholders through its communication channels regarding the NWA.</p> <p>c) The SUPPLIER, in consultation with subject area expert(s), shall identify appropriate NWA participants and solicit their attendance.</p> <p>d) The SUPPLIER shall ensure an “active offer” regarding the use of both official languages is made to the new participants.</p>	<p>a) Confirmation that participants were consulted regarding their official language preference and that communication is being provided pursuant to the identified preference.</p> <p>b) Confirmation that the required communication has been conducted.</p> <p>c) Confirmation that appropriate participants have been identified and secured their participation.</p> <p>d) Confirmation that language preferences were provided as identified through the “active offer” for the new participants.</p>
<p><b>Stage 4: Workshop and NWA Draft</b> (Guidance clauses 3.3, 3.3.1, 3.3.2, 3.3.3, 3.3.4, 3.3.5)</p>	<p>a) The SUPPLIER shall identify a NWA leader who is capable of leading and facilitating discussion. This should include the ability to facilitate discussions with PWLLE and other key stakeholders and populations, including First Nations, Inuit, Metis, Black Canadians, and people of colour.</p> <p>b) The leader shall help to ensure that a comprehensive discussion on identified topic(s) is conducted.</p> <p>c) The leader shall help to ensure all participants are provided the opportunity to express their viewpoints. The leader shall help to ensure that all participants</p>	<p>a) Confirmation that an appropriate leader has been identified.</p> <p>b) Confirmation that the SUPPLIER has facilitated the required discussion.</p> <p>c) Confirmation that the SUPPLIER has facilitated the opportunity</p>

Stage	Guidance	Deliverable
	<p>are able to communicate in the official language of their choice.</p> <p>d) The SUPPLIER shall document the agreed upon outcomes of the meeting discussions.</p> <p>e) The SUPPLIER shall draft the NWA and circulate with the participants. This may be repeated until general agreement of participants is achieved.</p> <p>f) Depending on the language preferences of participants voiced when the active offer was made, these may need to be done in both official languages.</p> <p><b>Note:</b> this process may be conducted through a facilitated online platform.</p>	<p>to collect all the viewpoints.</p> <p>d) Confirmation that the meeting outcomes address the objectives.</p> <p>e) Confirmation that general agreement has been reached on the circulated draft.</p> <p>f) Confirmation that language preferences were provided as identified through the “active offer”.</p>
<p><b>Stage 5: Publication</b></p> <p>(Guidance clauses 3.4, 3.4.1, 3.4.2, 3.4.3)</p>	<p>The SUPPLIER shall ensure that the published NWA includes an adequate descriptor to facilitate tracking.</p> <p>b) Develop and obtain SCC approval for any joint communications, if applicable. Any joint communications shall be in both official languages.</p> <p>c) The SUPPLIER shall publish the NWA within 2 months from the final workshop date, simultaneously in English and French, and proactively distribute it to affected/interested stakeholders.</p> <p>d) The SUPPLIER shall ensure that the NWA is published in English and French in a format that ensures it is available for viewing and downloading to people in Canada at no fee for a period of five (5) years or the life of the edition The cost displayed for the NWA shall be displayed as “\$0.00” or “at no fee” for Canadian IP addresses.</p> <p>e) A concise report explaining how the Technical Experts considered <a href="#">gender responsiveness</a>, anti-racism, stigma free, and health equity best practices when drafting the requirements of the NWA, and the outcome.</p>	<p>a) Confirmation that appropriate descriptor to facilitate tracking has been included.</p> <p>b) Obtain SCC approval for joint communications.</p> <p>c) Confirmation of the publication, including timing and language requirements, and of the proactive distribution.</p> <p>d) Confirmation that the National Workshop Agreement is publicly available on-line at no fee.</p> <p>e) Copy of report provided to SCC.</p>

Stage	Guidance	Deliverable
<p><b>Stage 6: Maintenance</b></p> <p>(Guidance clauses 3.5, 3.5.1, 3.5.2)</p>	<p>a) The SUPPLIER may monitor, track and collect feedback from users.</p> <p>Note: feedback collection may be conducted through a facilitated online platform.</p> <p>b) The SUPPLIER shall review the NWA within a 3-year timeframe.</p>	<p>a) Confirmation of any process that may be put in place to monitor, track and collect feedback from users.</p> <p>b) Confirmation that a process is in place to ensure that the review occurs within the 3-year timeframe.</p>

## **APPENDIX C – TECHNICAL EVALUATION CRITERIA**



## **APPENDIX C: TECHNICAL EVALUATION CRITERIA**

### **Technical Evaluation Process**

The technical evaluation for the development of a Workshop Agreement (WA) will consist of:

1. A determination of the compliance of each bid with the mandatory requirements stated in Part A below.
2. Each proposal that meets the stated mandatory requirements will be evaluated against the point-rated technical selection criteria. Bidders must achieve a minimum score of 70% (70 points of a possible 100 points) for the point-rated technical criteria as stated in Part B below. Only proposals meeting these requirements will be considered.
3. In the financial evaluation, tendered prices of the qualified bids will be computed as follows:

$$F = 30 + (21 * (1 + |n|)^{-n})$$

Where,

$$n = (Y - P) / Y$$

P = Bid Price

Y = Internal Budget

The financial evaluation may achieve a maximum score of 30 points.

An Evaluation Committee, consisting of at least three (3) SCC or SCC-appointed representatives, will be formed to assess all bids received in response to SCC RFP# 2023-03. The committee will be dissolved after the successful completion of their duties in selecting the Bidder with whom SCC will contract for the delivery of the WA for “Integration of Mental Health and Substance Use Health Services in Primary Care Settings”.

The technical evaluation for the successful bidder that will lead the development of the WA will consist of the two (2) phases described below:

4. Part A – Evaluation of Mandatory Requirements. This phase will consist of determining compliance of submitted Proposals against mandatory requirements. Proposals meeting all the mandatory requirements will be considered for the second phase. Proposals that do not substantially comply with all mandatory requirements and / or are substantially incomplete, will be disqualified and not evaluated further.
5. Part B – Evaluation of Point-Rated Criteria. This phase will consist of evaluating the (i) technical and (ii) cost merits of proposals, which meet the stated mandatory requirements, against the point-rated technical selection criteria. Respondents must achieve a minimum score of 70 points (of a possible 100 points) for the point-rated technical criteria, to be considered for the point-rated cost criteria, which will evaluate respondents' financial proposals for a maximum of 30 points. The highest-ranked Bidder will be determined using the highest combined rating of technical merit (70%) and cost (30%).

## **PART A: MANDATORY REQUIREMENTS**

Proposals will be assessed by an SCC Evaluation Committee to determine whether they meet mandatory requirements pertaining to:

- The Bidder, and
- The Project Team.

### **The Bidder**

Each Bidder submitting a response to RFP# 2023-03 for “Integration of Mental Health and Substance Use Health Services in Primary Care Settings” must demonstrate to the satisfaction of the Evaluation Committee that:

- The Bidder has the competency to develop standards solutions, and the ability to comply to SCC’s WA guidelines, by submitting two (2) copies of previously published consultation-based reports, guidance documents, best practices, or similar deliverables related to mental health and/or substance use health services;
- The Bidder must provide examples of facilitating stakeholder workshops to develop guidance documents;
- The Bidder has the capacity to engage the stakeholders identified by the Standards Council of Canada, as well as to identify and engage any additional experts necessary to ensure industry needs are incorporated in the development of the WA;
- The Bidder has the capacity to publish the WA within the timelines specified;
- The Bidder has the ability to develop a WA in English and French.

### **The Project Team**

Each Bidder must agree to the following mandatory requirements for the Project Leadership Team:

- At least three (3) years of experience in overseeing standards solutions development or similar guidance documentation;
- At least three (3) years of experience facilitating workshops (or other consultative engagements) related to mental health and/or substance use health; and
- At least two (2) years of experience managing committees of volunteer experts in the development of consensus-based standards solutions.

As part of the proposal, the Bidder must include the following information for each Team Member (resource):

- a) Name of the proposed Team Member and the role for which they are proposed;
- b) A list of qualifications directly related to the requirements;
- c) Chronological work experience;
- d) A detailed list of relevant academic and professional attainments.

**Only those proposals that are judged by the Evaluation Committee to have met all stipulated mandatory criteria will receive further consideration.**

## PART B: POINT-RATED REQUIREMENTS

Each proposal must demonstrate to the satisfaction of the Evaluation Committee that all stipulated mandatory requirements can be substantiated through the evaluation of the point-rated requirements in the following five (5) categories, for which the respondent must include a response:

Category		Max. Points
I.	Experience/competence of the bidding organization in developing standards solutions or similar guidance documentation	34
II.	Project team experience in type of work being proposed	26
III.	Distribution and outreach strategy	18
IV.	Project schedule	12
V.	Quality of the proposal	10
<b>Total Possible Points</b>		<b>100</b>

The point-rated requirements correspond to specific criteria, which have been identified as forming the basis for the accumulation of points in each of the five (5) categories. Each proposal **must include a response to each category**.

**70 of the possible 100 points must be achieved (70%) in order for the financial elements of the bid to be evaluated.**

The Evaluation Committee will assess the experience and competence of the Bidding Organization (“the Bidder”) with respect to RFP# 2023-03, in the development of standards solutions.

### I. Experience/competence of the bidding organization in developing standards solutions

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

“Recent”, unless otherwise stated means within the last five (5) years.

Criterion	Basis for Scoring	Possible Points
I.A The Bidder is asked to provide two (2) current or recent examples that demonstrate that the Project Team has <b>successfully managed volunteer expert committees</b> responsible for the development of guidance/best practices documents.	For each example, points will be awarded as follows: <ul style="list-style-type: none"> <li>- up to four (4) points if the example adequately demonstrates successful management;</li> <li>- up to seven (7) points if the example convincingly demonstrates successful management.</li> <li>- Note: If the Bidder provides more than two (2) examples, only the first two (2) examples will be scored in the order they appear.</li> </ul>	14

Criterion	Basis for Scoring	Possible Points
I.B The Bidder is asked to provide two (2) examples that demonstrate the Project Team has experience with the successful oversight of logistics for the development of guidance/best practices documents.	For each example, points will be awarded as follows: <ul style="list-style-type: none"> <li>- up to two (2) points if the example adequately demonstrates successful oversight;</li> <li>- up to four (4) points if the example convincingly demonstrates successful oversight.</li> <li>- Note: If the Bidder provides more than two (2) examples, only the first two (2) examples will be scored in the order they appear.</li> </ul>	8
I.C The Bidder is asked to demonstrate their ability to successfully develop a WA based on the SCC WA guidance.	Points will be awarded as follows: <ul style="list-style-type: none"> <li>- up to five (5) points for a <b>basic</b> plan that identifies key details, deliverables, and key assumptions;</li> <li>- up to eight (8) points for an <b>adequate</b> plan that identifies the main details, deliverables, and key assumptions;</li> <li>- up to twelve (12) points for a <b>thorough</b> plan, that includes details, deliverables, and key assumptions, and explains how they would contribute to the development of a strong WA.</li> </ul>	12

## II. Project team experience in the type of work being proposed

The Evaluation Committee will assess the experience and competence of the Bidder's proposed Project Team members with respect to the range of activities required for the development of a WA in the context of RFP# 2023-03.

The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The same example may be used to meet various criteria but must be revised accordingly to highlight the context within which it applies. The basis for scoring each criterion is provided in the table below.

**NOTE:** Unless otherwise specified, in cases where more than one Team Member is proposed for a specific resource category, an average of the individual scores will be used as the score for that particular category.

Criterion	Basis for Scoring	Possible Points
II.A The Bidder is asked to provide two (2) current or recent examples that demonstrate experience and competence in the development of guidance/best practices documents related to	For each example, points will be awarded as follows: <ul style="list-style-type: none"> <li>- up to four (4) points if the experience is <b>implied or indirect</b>;</li> <li>- up to eight (8) points if the experience is <b>explicit and directly</b> related to mental health and/or substance use health services.</li> </ul>	16

Criterion	Basis for Scoring	Possible Points
the mental health and/or substance use health and primary health care services.		
II.B The Bidder is asked to provide two (2) examples within the past three (3) years that demonstrate they have active relationships with organizations central to the integration of mental health and/or substance use health with primary health care services.	<p>For each example, points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- up to three (3) points if the experience convincingly demonstrates meaningful <b>communication</b> with the organizations;</li> <li>- up to five (5) points if the experience convincingly demonstrates a relationship that involves <b>active collaboration</b> with the organizations.</li> </ul>	10

### III. Distribution and outreach strategy

The Successful Bidder will plan and implement an outreach strategy to be approved by SCC in advance that will ensure appropriate engagement in the development of the WA and subsequently, increase awareness of the publication. Evaluation of each Bidder's proposed outreach strategy will be based on the Bidder's preliminary understanding of and connections with the target audience for the WA.

In particular, the Evaluation Committee will assess the depth of the Bidder's understanding of and connections with the target audience, proposed method(s) of communication, and any proposed complementary materials to facilitate greater awareness, understanding and application of the WA across Canada. The Bidder must provide examples that demonstrate the extent to which they meet each criterion. The basis for scoring with respect to each criterion is also provided in the table below.

Criterion	Basis for Scoring	Possible Points
III.A The Bidder is asked to demonstrate an understanding of and connections with the target audiences.	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- up to three (3) points for a <b>breakdown</b> of the target audiences into relevant organizational categories;</li> <li>- up to five (5) points for a <b>breakdown</b> of the target audiences into relevant organizational categories, <b>listing up to two (2) active contacts</b> in some of the organizational categories with whom the Bidder has an active relationship (including the contact's name, title, and organization);</li> </ul>	8

Criterion	Basis for Scoring	Possible Points
	<ul style="list-style-type: none"> <li>- up to eight (8) points for a <b>detailed breakdown</b> of the target audiences into relevant organizational categories, <b>listing up to two (2) active contacts</b> in each organizational category with whom the Bidder has an active relationship (including the contact's name, title, and organization).</li> </ul>	
<p>III.B The Bidder is asked to provide an example of experience promoting guidance/best practices documents and capacity to provide easily understood guidance to stakeholders.</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- up to one (1) point for demonstrating experience promoting standards solutions;</li> <li>- up to two (2) points for demonstrating experience promoting standards solutions <b>and</b> developing complementary guidance materials;</li> <li>- up to four (4) points for demonstrating experience promoting standards solutions <b>and</b> developing complementary guidance materials <b>for stakeholders that are also target audiences for contributing and/or implementing the WA.</b></li> </ul>	4
<p>III.C The Bidder is asked to identify short-term activities for promotion and outreach to facilitate awareness, distribution and understanding of the WA by the target audiences.</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- up to three (3) points for an outreach plan with <b>minimal</b> detail or insight;</li> <li>- up to six (6) points for a <b>detailed</b> outreach plan that <b>demonstrates understanding of the needs and characteristics of the target audience.</b></li> </ul>	6

#### IV. Project schedule

The Bidder is required to provide a proposed (preliminary) schedule for the development of the WA so that the Evaluation Committee may assess whether the Bidder has a realistic and well-ordered plan for the coordination of development work within the 8-month (July 2023 – February 2024) window, from start to finish. Because the project has an accelerated timeline, further points will be given if the proposed project schedule can complete the development of the WA in a shorter timeframe. The basis for scoring the proposed schedule is provided in the table below.

Criterion	Basis for Scoring	Possible Points
<p>IV.A The plan and schedule demonstrate that the Bidder has a clear and feasible plan for developing the WA within an 8-month timeframe and conducting distribution and outreach activities by mapping out the critical path including provisional dates.</p> <p>If a chart or image is included in the response, the resolution must be high enough such that all labels are clearly readable.</p> <p>A narrative should accompany the schedule, with explanation of how the timelines were determined, including key underlying assumptions.</p>	<p>Points will be awarded as follows:</p> <ul style="list-style-type: none"> <li>- up to four (4) points if the schedule <b>addresses some</b> main elements of the critical path, with <b>some explanation</b> of how the timelines were determined;</li> <li>- up to eight (8) points if the schedule <b>addresses nearly all</b> main elements of the critical path, with <b>some explanation</b> of how the timelines were determined;</li> <li>- up to twelve (12) points if the schedule <b>addresses all</b> main elements of the critical path, with a <b>thorough explanation</b> of how the timelines were determined, including <b>key underlying assumptions</b>.</li> </ul>	<p>12</p>

## V. Quality of the proposal

The Evaluation Committee will assess the quality of the proposal to determine whether the information organized within the proposal is presented in a clear and comprehensive fashion.

Criterion	Basis for Scoring	Possible Points
V.A The Bidder is asked to assure that material within the proposal is formatted, organized, and written in such a way as to make clear to the reviewer where responses to mandatory and point-rated requirements are located. The writing should also be concise, easy-to-read, and edited for typos.	Points will be awarded as follows: <ul style="list-style-type: none"><li>- no more than four (4) points if the proposal is poorly organized, difficult to read, and contains frequent typos;</li><li>- up to seven (7) points if the proposal is generally well-organized but is somewhat difficult to read and contains some typos;</li><li>- up to ten (10) points if the proposal is highly organized, concise, clearly written, and contains very few to no typos.</li></ul>	10



## **APPENDIX D - FINANCIAL PROPOSAL**

**APPENDIX D  
FINANCIAL TERMS AND CONDITIONS  
PAYMENT SCHEDULE**

<b>PROJECT PHASE</b>	<b>STAGE</b>	<b>COST</b>
Project Initiation	Stage 1: Preparatory Work	
Workshop Agreement Development	Stage 2: Proposal	
	Stage 3: Workshop Awareness	
	Stage 4: Workshop Agreement Draft	
Workshop Agreement Delivery	Stage 5: Publication	
	Stage 6: Maintenance	
<b>Contingency Amounts</b>		
<b>TOTAL:</b>		

**Notes**

1. All prices quoted are in Canadian funds (excluding HST).
2. End of Project Phase is based on the completion of the referenced stages; completion is deemed to be achieved once all deliverables for the referenced stages have been submitted by the Supplier and approved by SCC.
3. Project Completion occurs once the Supplier has completed all deliverables within the Scope of Work (see Appendix A) AND all invoices have been submitted.