

## REQUEST FOR PROPOSALS

Event Planner for the Canadian Cancer Research Conference (CCRC)

RFP No. RP801-2016-01

ISSUE DATE:	Thursday April 28, 2016
DEADLINE FOR PROPONENT ENQUIRIES	Wednesday May 11, 2016, no later than 5:00pm ET (Toronto Local time)
DEADLINE FOR ISSUING ADDENDA & RESPONSES TO PROPONENT ENQUIRIES	Friday May 13, 2016
PROPOSAL SUBMISSION DEADLINE	Thursday May 19, 2016, no later than 3:00pm ET (Toronto Local time)

PROPONENT ENQUIRIES only by e-mail to:  
[procurement@partnershipagainstcancer.ca](mailto:procurement@partnershipagainstcancer.ca)

**\*\*Proponents should reference this RFP number (RFP No. RP801-2016-01) in the subject line of their correspondence.\*\***

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## History of the Partnership

The Canadian Partnership Against Cancer (the Partnership) works with Canada's cancer community to reduce the burden of cancer through co-ordinated system-level change. Grounded in and informed by the experiences of those most affected by cancer, the organization plays a unique role working with partners to support multi-jurisdictional uptake of the knowledge emerging from cancer research and best practices in order to optimize cancer control planning and drive improvements in quality of practice across the country. Partners include provincial and territorial cancer programs; federal organizations and agencies; First Nations, Inuit and Métis organizations; national health and patient organizations; and individual experts who provide strategic cancer control insight and advice from both patient and professional perspectives.

Through sustained effort and a focus on the full cancer continuum from prevention and treatment through to survivorship and end-of-life care, the Partnership supports the collective work of the broader cancer control community in achieving long-term outcomes that will have a direct impact on the health of Canadians: reduced incidence of cancer, less likelihood of Canadians dying from cancer, and an enhanced quality of life of those affected by cancer. For more information, visit [partnershipagainstcancer.ca](http://partnershipagainstcancer.ca). The Partnership is also the driving force behind [cancerview.ca](http://cancerview.ca), which connects Canadians to cancer control services, information and resources. The Partnership is funded by Health Canada.

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## 1.0 INSTRUCTION TO PROPONENTS

### 1.1 *Invitation to Proponents*

This Request for Proposals ("RFP") is an invitation to Event Planner vendors (the "Proponents") to submit proposals (the "Proposals") for the services and deliverables briefly described in Schedule A (the "Deliverables"). This RFP is issued by the Canadian Partnership Against Cancer (the "Partnership"), a not-for-profit corporation funded by Health Canada, on behalf of the Canadian Cancer Research Alliance (CCRA).

### 1.2 *Enquiries*

Proponents should forward all enquiries and other communications, via e-mail only to:

[procurement@partnershipagainstcancer.ca](mailto:procurement@partnershipagainstcancer.ca)

All enquiries should be made via e-mail to the e-mail address above and enquiries submitted in any other way will not be accepted or answered. Proponents acknowledge that all enquiries received from Proponents and corresponding responses provided by the Partnership will be disclosed to all Proponents by way of an Addendum.

All enquiries and communications should be received prior to the Deadline for Proponent Enquiries set out in Section 1.7.

### 1.3 *Proposal Submission*

Proponents should submit their Proposals in two separate parts. The financial part will contain the price portion of the Proposal using the Pricing Sheet, in Schedule C. The technical part of will contain the rest of the Proposal. Each part should be submitted in an electronic file in accordance with the instructions in this section.

Proponents should submit six (6) printed hard copies of the Proposal with original signatures, packaged in a sealed envelope and labelled with the Proponent's name and address, delivered to the address below before the Proposal Submission Deadline set out in Section 1.7:

**Address:** Teresa DeFrenza  
Canadian Partnership Against Cancer Corporation  
1 University Ave, Suite 300  
Toronto, ON M5J 2P1



Proponents should also submit one electronic copy in Microsoft Word format or portable document format (PDF), sent by e-mail to the e-mail address shown below before the Proposal Submission Deadline.

E-mail: [procurement@partnershipagainstcancer.ca](mailto:procurement@partnershipagainstcancer.ca)

Proposals submitted in any other manner may not be accepted.

In the event of conflict or inconsistency between the hard copy and the electronic copy of the Proposal, the hard copy of the Proposal shall prevail. **Both the hard copy and electronic copy should be submitted before the Proposal Submission Deadline.** Failure to deliver either the hard or electronic copy to the Partnership, before the Proposal Submission Deadline may result in disqualification. It is the sole responsibility of the Proponent to ensure the hard copy and the electronic copy are received by the Partnership, before the Proposal Submission Deadline. Proposals submitted in any other manner may not be accepted.

#### **1.4 Agreement for Deliverables**

The selected Proponent will be required to enter into an agreement (the "Agreement") with the Partnership for the provision of the Deliverables and the Agreement shall include the terms and conditions set out in Schedule F to this RFP.

#### **1.5 Contract Period**

It is the Partnership's intention to enter into an Agreement with only one (1) legal entity. The term of the Agreement will begin after an award determination has been made and will be for the period up to December 31, 2017, with an option in favour of the Partnership to extend the Agreement on the same terms and conditions up to December 31, 2019.

A Proponent who submits conditions, options, variations or contingent statements to the terms and conditions set out in Schedule F, either as part of its Proposal or after receiving notice of selection, may be disqualified.

#### **1.6 No Guarantee of Volume of Work or Exclusivity of Agreement**

The Partnership makes no guarantee of the value or volume of work to be assigned to any Proponent. Any Agreement executed with a selected Proponent will not be an exclusive contract for the provision of the described services and deliverables. The Partnership may contract with others for the same or similar services and deliverables to those described in this RFP or may obtain the same or similar services and deliverables internally.



### 1.7 RFP Timetable and Process

The following is the schedule for this RFP:

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### 1.8 Submission Requirements

The Proposal should include:

- a) an executive summary;
- b) a summary of the Proponent's understanding of the requirements and strengths of the proposed approach;
- c) a description of the relevant qualifications and experience of the Proponent organization;
- d) references for three similar projects (excluding the Partnership) successfully completed by the Proponent organization within the last three years (Schedule D Form 1);
- e) a description of the proposed approach and work plan to accompany the Project Deliverables and Milestones (Schedule E);
- f) a description of the proposed project team structure, key roles and reporting relationships;
- g) names and resumes of the candidates proposed for each key role;
- h) a brief summary of the relevant qualifications and experience of each candidate proposed for each key role;
- i) unit and total prices for fees and expenses in a completed Pricing Sheet (Schedule C);
- j) project deliverables and Milestones (Schedule E) if applicable;
- k) any proposed changes to the Agreement Terms and Conditions (Schedule F), if applicable; and
- l) a completed and signed Form of Offer (Schedule B).

Failure to include any required components of the Proposal, as listed above may result in disqualification of the Proposal (see Section 1.9.1).



### 1.9 Evaluation Process and Criteria

Proposals will be reviewed and evaluated by an evaluation committee which is comprised of representatives of the Partnership and may include external advisors (the "Evaluation Committee").

#### 1.9.1. Mandatory Criteria

- The Partnership will evaluate Proposals for compliance with the following Mandatory Criteria:

<b>MANDATORY FORMS:</b>
Form of Offer (Schedule B)
Pricing Sheet (Schedule C)
References (Schedule D)
Deliverables and Milestones (Schedule E)

Any Proposal that does not meet the Mandatory Criteria may be disqualified. If a proposal is disqualified, it will not be further evaluated.

#### 1.9.2. Rating Criteria

Next, the Partnership will evaluate and score Proposals based on the following rating criteria:

Evaluation Criteria	Weights	Minimum Required Score
Qualifications and experience of the Proponent organization and key members of the proposed team: Experience <ul style="list-style-type: none"> <li>- managing conferences of similar size (~1000 attendees)</li> <li>- working with the research community</li> <li>- managing pan-Canadian events in collaboration/on behalf of hosting organizations</li> <li>- implementing/managing the registration process</li> <li>- implementing/managing the abstract submission process</li> <li>- promoting events, including promotion via social media</li> </ul>	30%	N/A





<ul style="list-style-type: none"> <li>- implementing mobile conference apps</li> <li>- managing exhibitor and poster exhibits, including electronic posters</li> <li>- developing and managing budgets</li> </ul>		
<p>Quality of the proposed approach and work plan</p> <ul style="list-style-type: none"> <li>- Description of project team structure</li> <li>- Well-developed work plan with clearly designed and developed milestones and deliverables</li> <li>- Client and vendor engagement strategy</li> <li>- Description of reporting mechanisms and controls</li> <li>- Demonstrated likelihood of timely delivery</li> </ul>	30%	N/A
<p>Interview</p> <ul style="list-style-type: none"> <li>- Discuss qualifications, experiences, methodology to complete scope of work and overall fit</li> <li>- Thoughtful and high-quality discussion that demonstrates strong understanding of and provides insight on the needs articulated in the RFP and the context for evaluation.</li> </ul>	15%	
Price (see Section 1.10 below)	25%	
<b>Total</b>	<b>100%</b>	<b>60</b>

NOTE: The Partnership reserves the right to revise the minimum required score threshold, if not enough Proposals have met the threshold.

### 1.9.3. Stages of the Proposal Evaluation

The Partnership may conduct the evaluation of Proposals in the following three (3) stages:

#### Stage I

Stage I will consist of a review to determine which Proposals comply with all of the mandatory requirements. Proposals which do not comply with all of the mandatory requirements, may, subject to the express and implied rights of the Partnership, be disqualified and not be evaluated further.

#### Stage II

Stage II may consist of scoring by the Partnership of each qualified Proposal on the basis of the rating criteria. The Partnership will shortlist the top 3 scoring Proposals and their respective Proponent organizations may be invited to an interview at the Partnership offices. Interviews to be scheduled at a time that is convenient for the Partnership.



### Stage III

Upon completion of Stage II for all Proposals, the sealed pricing envelope provided by the Proponent(s) that meet the Minimum Required Score will then be opened and Stage III may consist of a scoring of the pricing submitted. The evaluation of price may be undertaken after the evaluation of mandatory requirements (Stage I) and any rated requirements (Stage II) has been completed.

The formula to be used for scoring price is as follows:

$S = MP \times L / P$ , where:

S = the price score for the Proposal being evaluated;  
MP = the maximum points awarded for price;  
L = the price of the lowest price remaining Proposal; and  
P = the price of the Proposal being scored.

### Cumulative Score

At the conclusion of Stage III, the scores from Stage II and Stage III will be added and, subject to satisfactory reference checks and the express and implied rights of the Partnership, the highest scoring Proposal should be selected and the Proponent of that Proposal will be invited to enter into the Agreement in accordance with Sections 1.4, 1.5 and 2.13.

The Partnership intends to award an Agreement to the Proponent who submits the most advantageous Proposal to the Partnership as determined by the Partnership through the evaluation process.

The Proposal with the lowest price will not necessarily be selected. While price is a determinant in the selection process, it is to be clearly understood that there must be a full and complete understanding of the services/deliverables to be provided, demonstrated through the Proposal as presented, as well as a commitment to the Agreement terms and conditions set out in Schedule F. It is the intention of the Partnership to enter into an Agreement with the Proponent providing the best value to the Partnership, as identified through the evaluation process.

If no Proponents demonstrate appropriate qualifications or experience, the Partnership may, without liability cost or penalty, cancel this RFP or choose not to award an Agreement to any of the Proponents.



### **1.10 *Pricing and Timing***

Please submit the price for completion of this project (both fees and expenses). The Proponent should assume that it is required to supply all necessary professional staff to undertake the project. The Proponent should provide a firm maximum ceiling price for the assignment and a proposed payment schedule. The Proponent must submit pricing (Schedule C) in a separate sealed package or separate electronic file from the rest of the Proposal (see Section 1.3).



## 2.0 SUPPLEMENTARY TERMS AND CONDITIONS

The Partnership may amend the schedule for this RFP in its sole discretion at any time prior to the Proposal Submission Deadline.

### 2.1 *All New Information to Proponents by way of Addenda*

This RFP may be amended only by a written addendum (an “**Addendum**”) in accordance with this section. If the Partnership, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all Proponents by Addenda made available to all Proponents in the same way as the original RFP. Each Addendum shall form an integral part of this RFP. Any amendments or supplements to this RFP made in any other manner shall not be binding. **It is the sole responsibility of the Proponent to ensure that it has received all Addenda pertaining to this RFP.** The Partnership will not take any responsibility for losses, misunderstandings, errors or omissions from the Proponent not having received or reviewed any and all Addenda.

### 2.2 *Ownership of Proposals*

All information obtained by the Partnership from Proponents in connection with this RFP will remain with the Partnership and be retained for internal purposes. Information provided by Proponents in response to this RFP may be disclosed by the Partnership if permitted or required by law.

### 2.3 *Governing Law of RFP Process*

The RFP process shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein.

### 2.4 *Proponents to Follow Instructions*

Proponents should structure their Proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a Proposal should reference the applicable section numbers of this RFP where that request was made. Proponents responding to the RFP should provide additional information related to contacts and their corporate identity and status.

- The Proponents *must* submit a signed Form of Offer in the form of Schedule B with its Proposal.
- The Proponent should identify a single point of contact through which all communications from the Partnership will be channeled.



- Corporate information and signing authority: The legal status (incorporation, partnership, etc.) and registered legal name of the Proponent must be clearly identified in the Proposal, along with the name, title and telephone number of the individual who will be the Proponent's signing authority for the Agreement. Proponents should also include their HST number or the relevant information required for taxation purposes.

## **2.5 *Proponents Shall Bear Their Own Costs***

The Proponent shall bear all of its own costs associated with or incurred in the preparation, presentation and submission of its Proposal including, if applicable, costs incurred for interviews, site visits or demonstrations.

## **2.6 *Communication after Issuance of RFP***

Proponents shall promptly examine all of the documents comprising this RFP and shall report any errors, omissions or ambiguities, and may direct questions or seek additional information by e-mail to the e-mail address set out in Section 1.2, before the Deadline for Proponent Enquiries set out in Section 1.7. No such communications are to be directed to the Partnership in any other manner. It is the responsibility of the Proponent to seek clarification from the Partnership on any matter it considers to be unclear. The Partnership is under no obligation to provide additional information; but, may do so at its sole discretion.

## **2.7 *Partnership May Seek Clarification and Incorporate Response into Proposal***

The Partnership reserves the right to seek clarification and supplementary information from Proponents after the Proposal Submission Deadline. The response received by the Partnership from a Proponent shall, if accepted by the Partnership, form an integral part of that Proponent's Proposal. The Partnership reserves the right to interview any or all Proponents to obtain information about or clarification of their Proposals. If the Partnership receives information at any stage of the evaluation process which results in earlier information provided by the Proponent being deemed by the Partnership to be inaccurate, incomplete, faulty or misleading, the Partnership reserves the right to revisit the Proponent's compliance with the mandatory requirements and/or adjust the scoring of the responses to the rated requirements.

## **2.8 *RFP Incorporated into Proposal***

All of the provisions of this RFP and its schedules are deemed to be accepted by each Proponent and incorporated into each Proponent's Proposal.



## **2.9 Confidentiality**

All information received by the Proponent provided by or obtained from the Partnership in any form in connection with this RFP either before or after the issuance of this RFP:

- is the sole property of the Partnership and must be treated as confidential;
- is not to be used for any purpose other than replying to this RFP and the performance of any subsequent Agreement; and
- shall be returned by the Proponent to the Partnership immediately upon the request of the Partnership.

## **2.10 Disqualification**

The Partnership may disqualify a Proposal on grounds of faulty submission, improper conduct or provision of inaccurate or misleading information by the Proponent.

## **2.11 Reserved Rights**

The Partnership, without liability, cost or penalty reserves the right to:

1. amend or supplement this RFP at any time prior to five (5) calendar days before the Proposal Submission Deadline;
2. reject any or all Proposals in its absolute discretion;
3. make public the names of any or all Proponents;
4. verify with any third party any information set out in a Proposal;
5. check references other than those provided by any Proponent;
6. disqualify any Proposal that contains misrepresentations or any other inaccurate or misleading information;
7. make changes, including substantial changes, to this RFP provided that those changes are issued by way of Addenda in the manner set out in this RFP;
8. accept any Proposal in whole or in part;
9. accept Proposals from more than one Proponent;
10. cancel this RFP process at any stage and/or issue a new RFP for the same or similar services or deliverables;
11. adjust the scoring of or reject a Proponent's Proposal on the basis of:
  - (i) a financial analysis determining the actual cost of the Proposal when considering factors including quality, service, price and transition costs arising from the replacement of existing goods, services, practices, methodologies and infrastructure (howsoever originally established);
  - (ii) information provided by references;
  - (iii) the information provided by a Proponent pursuant to the Partnership exercising its clarification rights under this RFP process; or
  - (iv) other relevant information that arises during this RFP process; or



12. waive formalities and accept Proposals that substantially comply with the requirements of this RFP;
13. this RFP is not an offer to enter into a bidding contract (often referred to as "Contract A") or a contract to carry out the services contemplated in this RFP (often referred to as "Contract B"). Neither this RFP nor the submission of a response nor its receipt by the Partnership shall create any contractual rights or obligations whatsoever on either the Partnership or any Proponent, nor oblige the Partnership in any manner whatsoever.

### **2.12 *Bait and Switch***

By submitting a Proposal the Proponent agrees and acknowledges that it will provide for the duration of the project, the full complement of staff required to perform the work of the project, including the specific individuals identified in its Proposal.

The Proponent agrees to provide all professional personnel necessary to perform the scope of work, including those who are named in the Proposal submitted in response to the Partnership's RFP. These key personnel shall remain assigned for the duration of the project, unless otherwise agreed to in writing by the Partnership. In the event the Proponent wishes to substitute any of the key personnel, the individual(s) proposed should demonstrate similar qualifications and experience as required to successfully perform such duties. The Partnership shall have the sole right to determine whether key personnel proposed as substitutes are qualified to work on the project. The Partnership shall not unreasonably withhold approval of staff changes.

### **2.13 *Execution of the Agreement***

In addition to all of the Partnership's other remedies, if a selected Proponent fails to execute the Agreement or satisfy any other applicable conditions within one hundred twenty (120) days after notice of selection, the Partnership may, in its sole and absolute discretion and without incurring any liability, rescind the selection of that Proponent and proceed with the selection of another Proponent.

### **2.14 *Negotiations***

The Partnership may award a contract on the basis of initial Proposals received, without discussion. Therefore, Proponents' Proposals should contain the Proponents best terms/information, including all required documentation.

The Partnership reserves the right to enter into discussions/negotiations with the preferred Proponent. The Partnership has the right, as part of the discussion/negotiation to negotiate changes, amendments or modifications to the Proposal as submitted, without offering other Proponents the opportunity to amend



their Proposals. There shall not be a binding contract unless and until the Partnership and the Proponent have entered into the agreement for the provision of the services contemplated in this RFP on terms and conditions acceptable to the Partnership and the preferred Proponent, at which time the preferred Proponent shall become the successful Proponent.

If for any reason, the Partnership is unable to negotiate a successful contract with the selected Proponent, the Partnership may terminate the negotiations and may either terminate the RFP process or proceed to enter into negotiations with another Proponent, who shall thereupon become the selected Proponent. This process would continue until a contract has been executed, the RFP process is terminated or the Proponents have been rejected.





## SCHEDULE A - Services and Deliverables

### Background

This RFP is being issued by the Partnership, on behalf of the Canadian Cancer Research Alliance (CCRA).

### History of the CCRA

The CCRA is an alliance of cancer research funding organizations and affiliated partners working together to enhance the overall state of cancer research funding in Canada through improved communication, cooperation, and coordination. The CCRA is comprised of 32 organizations that collectively represent the custodians of the majority of taxpayer dollars and donations devoted to investing in research that will lead to better ways to prevent, diagnose, and treat cancer and improve survivor outcomes. CCRA membership includes federal research funding programs/agencies, provincial agencies, national and provincial cancer charities as well as provincial cancer agencies.

The Partnership supports the CCRA Executive Office and is a member of CCRA.

### About the Canadian Cancer Research Conference (CCRC)

The CCRC is Canada's only conference devoted to the continuum of cancer research from discovery to palliation and policy. Since its inaugural meeting in 2011, this biennial conference showcases the breadth and excellence of research in Canada, provides a venue for networking and cross-fertilization within and between research disciplines, communicates the impact of Canada's cancer research investment to the public and media, and provides a means for agencies to connect with their research communities. The next CCRC will be held in Vancouver in November 2017. The expected registration will be between 900-1000 participants. Previous conferences were held in Montreal (2015) and Toronto (2013 and 2011).

The CCRC's scientific program features presentations from national and international leaders in cancer research through its unique blend of plenary sessions, breakout symposia, poster sessions, oral poster presentations, and exhibits. The scientific program also includes the Careers in Cancer Research Development Program supported by the Canadian Institutes of Health Research (CIHR), Institute of Cancer Research and Canadian Cancer Society Research Institute, and a number of satellite meetings and workshops hosted by various organizations were held during the conference. Finally, the CCRC's satellite Community Forum provides a unique opportunity for members of the public to meet and ask questions of some leading cancer researchers from across Canada.



### *Objectives/Purpose*

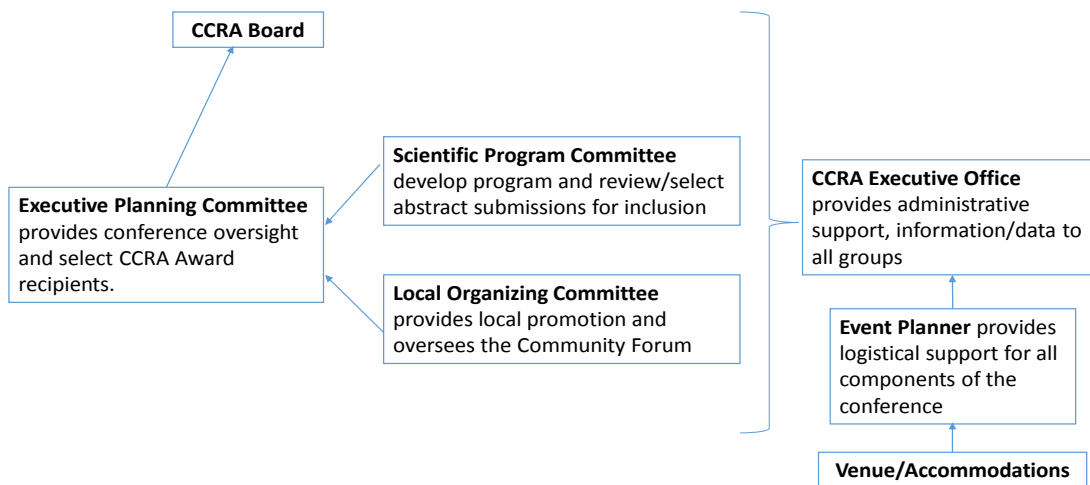
On behalf of the CCRA, the Partnership requests Proposals from experienced individuals, organizations, or teams to act as the successful Proponent to organize and manage the 2017 CCRC with an opportunity to extend the contract to future conferences. The 2017 conference will be held at the Vancouver Convention Centre from November 5 to 7, 2017, with satellite events and conference move-in occurring on November 4, 2017. A contract with the Vancouver Convention Centre, as well as area hotels are already in place.

The individual or team acting as the successful Proponent will perform the key organization and logistical coordination functions for the conference. The successful Proponent should have thorough attention to detail, excellent communication and people skills, strong organization skills, and demonstrated experience in special events coordination (including fundraising, budget development and management, registration management, abstracts management, events promotion, and exhibit space management).

### **Project Scope**

The CCRA Executive Office will oversee and approve all activities related to the conference. A schema of the conference planning process is provided below. The draft program schedule and the roles and responsibilities of the successful Proponent and the CCRA Executive Office follow.

## CCRC Planning Process





**DRAFT PROGRAM SCHEDULE**

	SAT. NOV. 4/17	SUN. NOV. 5/17	MON. NOV. 6/17	TUES. NOV. 7/17
6:30 AM		SATELLITE MEETINGS	SATELLITE MEETINGS	SATELLITE MEETINGS
7:00 AM				
7:30 AM	Satellite Meetings (includes full day for Careers in Cancer Research Development Program) plus Conference Move-in/Set-up - Banner Signage, Exhibits, Posters	BREAKFAST	BREAKFAST	BREAKFAST + Supporter Recognition Breakfast
8:00 AM				
8:30 AM		Welcome	Plenary	Plenary
9:00 AM				
9:30 AM		Plenary	BREAK	BREAK
10:00 AM				
10:30 AM			Concurrents	Plenary
11:00 AM		BREAK		
11:30 AM		Concurrents	LUNCH	CLOSING REMARKS
Noon				BOXED LUNCH
12:30 PM			LUNCH	SATELLITE MEETINGS
1:00 PM		LUNCH	Plenary	
1:30 PM				
2:00 PM		Poster Session	BREAK	
2:30 PM				
3:00 PM		CCRA Awardees	Concurrents	
3:30 PM				
4:00 PM			Poster Session	
4:30 PM				
5:00 PM		Welcome Reception		
5:30 PM				
6:00 PM				
6:30 PM	Community Forum (Other Satellite meetings may also run during this time)			
7:00 PM				
7:30 PM				
8:00 PM				
8:30 PM				
9:00 PM				



Activity	Successful Proponent	CCRA Executive Office
<b>Venue &amp; Attendee Accommodation</b>	a) Complete two site visits pre-conference to the Vancouver Convention Centre and to the hotels contracted to provide attendee accommodation with CCRA Executive Office staff. One visit must take place before December 31, 2016. b) Organize space logistics for satellite meetings in conjunction with the space allocations for the scientific program and Community Forum determined by the CCRA Executive Office c) Develop catering menus for breakfasts and lunches, welcome reception, and Community Forum (excludes the Supporter Recognition Breakfast) with venue catering. d) Manage audiovisual (A/V) requirements. e) Map exhibits to space (~20) and prepare Exhibitor Prospectus (with order forms, shipping information, etc.). f) Manage exhibit logistics. g) Manage poster exhibits (~600), which may include electronic posters h) Manage guestroom block(s). i) Report on hotel room pick-up monthly after the opening of registration.	a) Determine space allocations for Scientific Program and Community Forum. b) Sign-off on space allocations for exhibits. c) Sign-off on catering menus. d) Develop catering menus for Supporter Recognition Breakfast. e) Provide onsite support for Community Forum and Supporter Recognition Breakfast.
<b>Registration</b>	a) Develop online registration system in accordance with specifications provided by the CCRA Executive Office, which allows payment by credit card (and debit where possible). PayPal is not acceptable. b) Register to collect B.C. PST to enable appropriate tax collection as	a) Provide specifications for registration system. b) Determine conference registration fees. c) Conduct all promotions related to the conference



Activity	Successful Proponent	CCRA Executive Office
	<p>required for conference registration.</p> <p>c) Manage online (early bird and general) registrations.</p> <p>d) Manage on-site registrations.</p> <p>e) Report bi-weekly on number of registrations by category, starting two weeks after the opening of registration to three days before conference.</p> <p>f) Provide a detailed registration list two weeks after the conference, which accurately captures attendees by their status.</p> <p>g) Manage and bank conference fees and forward accumulated registration fees periodically when they reach the \$50K level.</p>	<p>and field calls from prospective attendees.</p> <p>d) Update Committees on registration numbers.</p>
<p><b>Abstracts</b></p>	<p>a) Develop online abstract submission system.</p> <p>b) Manage abstract submissions.</p> <p>c) Distribute abstracts to appropriate reviewers (~25 reviewers).</p> <p>d) Communicate with submitters re: the status of the review process.</p> <p>e) Communicate with successful abstract submitters re: the number/location of their posters within the poster exhibit.</p> <p>f) Provide monthly updates on the number of abstracts submitted.</p> <p>g) Furnish the abstracts in Excel format to the Executive Office once the review has been completed.</p>	<p>a) Provide specifications for abstract submission system.</p> <p>b) Update Committees on numbers of abstracts submitted.</p> <p>c) Prepare abstract book.</p> <p>d) Forward abstract book to all registrants via email.</p>
<p><b>Scientific Program</b></p>	<p>a) Provide a mobile solution for the conference program.</p> <p>b) Develop social media presence to help promote conference.</p>	<p>a) Ensure the program is kept up-to-date on the CCRC website.</p> <p>b) Prepare/print the final program and send to the venue.</p>



Activity	Successful Proponent	CCRA Executive Office
<p><b>Program Logistics</b></p>	<p>a) Provide onsite support from November 4-7, inclusive, for all hours of the scientific program and satellite meetings. No support expected for supporter breakfast or Community Forum.</p> <p>b) Provide advice/feedback re: supportership matrix.</p> <p>c) Manage all satellite meetings, liaising with host organizations to arrange meeting space, A/V and catering as required (~10 meetings anticipated).</p> <p>d) Liaise with all exhibitors to ensure their needs are met.</p> <p>e) Provide signage as needed for the venue. Banner-type signage will be required for the exhibit space.</p> <p>f) Ensure venue has information needed for electronic signage for meeting rooms.</p> <p>g) Provide name badges for all attendees (pre-registrants and onsite registrants), which clearly differentiate staff, session presenters/chairs, and registrants.</p> <p>h) Order lanyards, conference bags, USB keys, and other conference-related items (artwork will be provided by the CCRA Executive Office).</p> <p>i) Collate delegate packages as needed.</p> <p>j) Arrange for photographer to be onsite during the conference.</p>	<p>a) Maintain conference website.</p> <p>b) Promote conference via emails and through the conference website.</p> <p>c) Work with the Local Organizing Committee to undertake promotion for the Community Forum.</p> <p>d) Provide onsite support for all components of the program (4 FTEs available for all dates/times).</p> <p>e) Liaise/work with all presenters/session chairs for the scientific program and Community Forum.</p> <p>f) - Develop/execute post-event surveys for scientific program, supporters, and Community Forum.</p>
<p><b>Budget</b></p>	<p>a) Provide advice re: conference supportership.</p> <p>b) Provide advice re: cost savings methods of conference delivery.</p> <p>c) Provide feedback on conference budget.</p>	<p>a) Prepare/maintain conference budget.</p> <p>b) - Complete the supportership matrix and secure supporter funding for the conference.</p>



## SCHEDULE B - Form of Offer

The Proponent must not amend this Form in any way other than by providing the requested information. This form must be completed, signed and submitted as part of the Proponent's Proposal.

To the Canadian Partnership Against Cancer:

### 1. Proponent Information

(a) The full legal name of the Proponent is:

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(b) Any other relevant name under which the Proponent carries on business is:

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(c) The jurisdiction under which the Proponent is governed is:

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(d) The name, address, telephone, facsimile number and e-mail address of the contact person for the Proponent is:

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(e) The Proponent is:

***Proponents must select one of the following choices.***

- an individual
- a sole proprietorship
- a corporation
- a partnership
- a joint venture
- an incorporated consortium
- a consortium that is a partnership
- other legally recognized entity: {Specify type or state "N/A".}



**2. Offer**

The Proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. By submitting the Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the RFP, including the Agreement Terms and Conditions set out in Schedule F of the RFP, and offers to provide the Deliverables in Schedule A in accordance therewith at the price set out in the Pricing Sheet at Schedule C.

**3. Mandatory Forms**

(a) The Proponent encloses herewith as part of the Proposal, the mandatory forms set out below:

MANDATORY FORMS:	Yes	Page
Form of Offer (Schedule B)		
Pricing Sheet (Schedule C)		
References (Schedule D)		
Deliverables and Milestones (Schedule E)		

**4. Price**

The Proponent has submitted its price in accordance with the instructions in the RFP and in the form set out at Schedule C.

**5. Addenda**

The Proponent is deemed to have read and accepted all Addenda issued by the Partnership prior to the Deadline for Issuing Addenda. The onus remains on the Proponent to make any necessary amendments to the Proposal based on the Addenda. The Proponent confirms that it has received the following Addenda:

{List Addenda numbers or, if no Addenda were issued, state "None".}

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**6. Bid Validity**

The Proponent agrees that its Proposal shall be valid for ninety (90) days following the Proposal Submission Deadline.





## 7. Conflict of Interest

The Proponent, by submitting the Proposal, confirms that to its best knowledge and belief no actual or potential Conflict of Interest exists with respect to the submission of the Proposal or performance of the contemplated Agreement other than those disclosed in this Form of Offer. Where the Partnership discovers a Proponent's failure to disclose all actual or potential Conflicts of Interest, the Partnership may disqualify the Proponent or terminate any Agreement awarded to that Proponent as a result of this procurement process.

Conflict of Interest includes, but is not limited to, any situation or circumstance where:

- a) in relation to the RFP process, the Proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to
  - i. having or having access to information in the preparation of its Proposal that is confidential to the Partnership and not available to other Proponents;
  - ii. communicating with any person with a view to influencing preferred treatment in the RFP process; or
  - iii. engaging in conduct that compromises or could be seen to compromise the integrity of the RFP process and render that process non-competitive and unfair; or
- b) in relation to the performance of its contractual obligations under the Agreement, the supplier's other commitments, relationships or financial interests
  - i. could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgment; or
  - ii. could or could be seen to compromise, impair or be incompatible with the effective performance of its contractual obligations.

***Proponents must choose one of the following two options.***

The Proponent declares that: (1) there was no Conflict of Interest in preparing its Proposal; and (2) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

OR

The Proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its Proposal, and/or the Proponent foresees an actual or potential Conflict of Interest in performing the contractual



obligations contemplated in the RFP. The details of the actual or potential Conflict of Interest are as follows:

**8. Disclosure of Information**

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or if required by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the Partnership to its advisers retained for the purpose of evaluating or participating in the evaluation of this Proposal.

**9. Execution of Agreement**

The Proponent understands that, in the event its Proposal is selected by the Partnership, in whole or in part, the Proponent agrees to finalize and execute a Services Agreement incorporating the terms and conditions set out in Schedule F to the RFP, in accordance with the terms of the RFP.

I confirm that this Form of Offer has been completed with no changes to the text provided in the RFP.

Signature of Witness:	Signature of Proponent representative:
Name of Witness:	Name and Title of Proponent representative:
	Date:  I have authority to bind the Proponent.



## SCHEDULE C - Pricing Sheet

The Contractor shall deliver the following goods or services or both under this Contract.

**Table C1. Budget by Milestone**

Enter the budget against each milestone specified.

Budget by Milestone		
Milestone	Budget	Description of Budget
<b>September 6, 2016 to March 31, 2017</b>		
<ul style="list-style-type: none"> <li>Complete first site visit with venue and three hotels with CCRA Executive Office</li> </ul>		
<ul style="list-style-type: none"> <li>Develop/test registration system</li> <li>Develop/test abstract submission/management system</li> <li>Coordinate/test set-up of personalized online reservation systems with 3 hotels</li> </ul>		
<ul style="list-style-type: none"> <li>Develop social media presence to help promote conference</li> </ul>		
<ul style="list-style-type: none"> <li>Provide advice on conference finances and sponsorship matrix</li> </ul>		
<b>April 1, 2017 to August 31, 2017</b>		
<ul style="list-style-type: none"> <li>Complete second site visit with venue and three hotels with CCRA Executive Office</li> </ul>		
<ul style="list-style-type: none"> <li>Conduct conference registration from April 3, 2017 to October 31, 2017 (early bird until August 31, 2017)</li> </ul>		
<ul style="list-style-type: none"> <li>Conduct abstract submission process from April 3, 2017 to May 19, 2017</li> <li>Undertaken abstract review process (to be completed by July 14, 2017)</li> <li>Notify submitters about abstract review results (to be completed by July 31, 2017)</li> </ul>		
<ul style="list-style-type: none"> <li>Develop mobile app for scientific program</li> </ul>		



Budget by Milestone		
Milestone	Budget	Description of Budget
<ul style="list-style-type: none"> <li>Provide updates on registration numbers (biweekly) and abstract submissions (monthly) to CCRA Executive Office</li> </ul>		
<b>September 1, 2017 to November 3, 2017</b>		
<ul style="list-style-type: none"> <li>Provide lanyards, conference bags, USB keys, and other conference-related items (artwork will be provided by the CCRA Executive Office).</li> </ul>		
<ul style="list-style-type: none"> <li>Provide final abstract database in Excel workbook to CCRA Executive Office by August 1, 2017</li> </ul>		
<ul style="list-style-type: none"> <li>Provide signage (including banner signage and electronic)</li> </ul>		
<ul style="list-style-type: none"> <li>Prepare name badges</li> </ul>		
<ul style="list-style-type: none"> <li>Prepare USBs with scientific program and abstract PDFs</li> </ul>		
<ul style="list-style-type: none"> <li>Manage guestroom blocks (3 hotels)</li> <li>Finalize catering menus and A/V requirements and conduct all pre-conference meetings with facilities/suppliers (banquet orders, A/V orders, etc.)</li> </ul>		
<b>November 4, 2017 to November 7, 2017</b>		
<ul style="list-style-type: none"> <li>Prepare delegate bags (if needed) - November 4, 2017</li> <li>Conduct onsite registration</li> <li>Provide onsite event management and troubleshooting during scientific program and satellite meetings</li> </ul>		



November 8, 2017 to December 31, 2017		
<ul style="list-style-type: none"> <li>• Debrief with CCRA Executive Office</li> <li>• Provide final detailed registration list</li> <li>• Forward remaining registration fees</li> </ul>		
<b>Subtotal</b>		
<b>HST</b>	\$	
<b>Additional Expenses</b>		
<b>Total Budget</b>		

**Additional Expenses**

Please provide a list of all additional expenses including but not limited to: administrative costs, out of pocket expenses, transportation, food etc.

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**Total Proposed Price (Agreement Ceiling Price for fees)**      \$

This Proponents Submission is made entirely in accordance with RP801-2016-01 by your signature hereunder, it is deemed that you have read and agreed to all terms and conditions in the same manner as had such terms and conditions appeared above your signature, and that you have the authority to bind the Proponents.

Signature of Proponent representative:
Name and Title of Proponent representative:
Date:
I have authority to bind the Proponent.



## SCHEDULE D - Reference Form

### Form D1

*Each Proponent should provide references from a minimum of two (2) different clients (excluding the Partnership) who have obtained services similar to those required in this RFP from the Proponent within the last five (5) years.*

*The Partnership is not required to contact all references provided by the proponent. In addition, references other than those provided by the proponent (including but not limited to Partnership staff) may be contacted to obtain additional information that will be used in evaluating the Proponent's past performance.*

*Past performance will be evaluated on a pass/fail basis. Items to be evaluated include but is not limited to:*

- 1. Conformance to contract requirements*
- 2. Adherence to contract schedules*
- 3. Cost Performance*
- 4. Risk Management*
- 5. Reasonable and Cooperative behavior (Business relations)*
- 6. Commitment to Customer Service*
- 7. Concern for the interest of the Customer*

Proponent: \_\_\_\_\_

### Reference #1

Company Name:	
Company Address:	
Contact Name:	
Contact Title:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

### Reference #2

Company Name:	
Company Address:	
Contact Name:	
Contact Title:	



Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

**Reference #3**

Company Name:	
Company Address:	
Contact Name:	
Contact Title:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

**Form D2**

*Each Proponent should provide references from two (2) different clients (excluding the Partnership) to whom each candidate proposed for a key role has provided services within the last five (5) years in a role similar to that set out for the candidate in the Proposal.*

*Please include in the Proposal a separate copy of this part of the reference form for each candidate proposed for each key role set out in the Proposal.*

Name of Candidate: \_\_\_\_\_  
Proposed Role: \_\_\_\_\_

**Reference #1**

Company Name:	
Company Address:	
Contact Name:	
Contact Title:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

**Reference #2**

Company Name:	
Company Address:	
Contact Name:	
Contact Title:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	





## SCHEDULE E - Project Deliverables and Milestones

The Proponent shall deliver a detailed work plan, including the deliverables, timelines and project team accountabilities under this Contract.

Deliverable/Milestone	Timeline	Responsibility



## SCHEDULE F - Terms and Conditions of the Agreement

### **Background:**

The funding for this contract (the “Contract”) provided by the Canadian Partnership Against Cancer Corporation (the “Partnership”) is, in whole or in part, obtained pursuant to a funding agreement (the “Health Canada Funding Agreement”) between the Partnership and Her Majesty the Queen in Right of Canada as represented by the Minister of Health (the “Minister”);

The Health Canada Funding Agreement requires the Partnership to require certain minimum terms and conditions in agreements.

The provider of the Work in the Contract (the “Contractor”) acknowledges the source of the funding and recognizes the need to ensure that there is a high level of accountability and transparency in the receipt and expenditure of the funding.

The parties in the Contract agree that the following terms and conditions are included in addition to any other terms of the Contract:

### **1. Conflict and Priority**

Any provision in the Contract other than these additional terms and conditions that is in conflict with any provision in these additional terms and conditions shall take precedence unless there is a specific statement in the Contract to the contrary.

### **2. Definitions:**

In this contract,

- a) “Amount” means the amount expressed in the Contract to be payable to the Contractor for the Work;
- b) “Contract” means the agreement to which these additional terms and conditions form a part;
- c) “Contractor” means the person or entity whose name appears on the signature page of the Contract and who is to supply the goods or services to the Partnership under the Contract;
- d) “Partnership” means Canadian Partnership Against Cancer Corporation;
- e) “Party” means the Partnership or the Contractor or any other signatory to the Contract and “Parties” means all of them;

- f) “Work” means the whole of the activities, services, materials, equipment, software, matters and things required to be done, delivered or performed by the Contractor in accordance with the terms of the Contract.

### **3. Accounts and Audit**

- a) The Contractor shall keep proper accounts and records of the cost to the Contractor of the Work and of all expenditures or commitments made by the Contractor in connection therewith, and shall keep all invoices, receipts and vouchers relating thereto. The Contractor shall not, without the prior written consent of the Partnership, dispose of any such accounts, records, invoices, receipts or vouchers until the expiration of six (6) years after final payment under this Contract, or until the settlement of all outstanding claims and disputes, whichever is later.
- b) All such accounts and records as well as any invoices, receipts and vouchers shall at all times during the retention period referred to in subsection a) be open to audit, inspection and examination by the authorized representatives of the Partnership, the Minister or the Auditor General of Canada, who may make copies and take extracts thereof. The Contractor shall provide all facilities for such audits and inspections and shall furnish all such information as the representatives of the Partnership may from time to time require with respect to such accounts, records, invoices, receipts and vouchers.

### **4. Appropriation**

Payment under the Contract at any given time is subject to the Partnership having been provided sufficient funding from the Minister for the fiscal year in which the payment is due.

### **5. Assignment**

- a) The Contract shall not be assigned in whole or in part by the Contractor without the prior written consent of the Partnership, and any assignment made without that consent is void and of no effect.
- b) No assignment of the Contract shall relieve the Contractor from any obligation under the



Contract or impose any liability upon the Partnership unless otherwise agreed to in writing by the Partnership.

furnished by the Contractor to the Partnership at such times as the Partnership may reasonably request.

#### **6. Changes**

- a) If, on the basis of progress reports provided to the Partnership or for any other reason, the Partnership and the Contractor decide that modifications to the Work or modifications to line items within the budget are needed, the appropriate changes may be made by the administrative contact for the Partnership and the Contractor provided that no increase shall be made to the maximum amount payable hereunder and further provided that no other term of the Contract may be altered in this fashion.
- b) If the change is greater than 15% or \$50,000 of the maximum amount payable, whichever is lesser, or if the maximum amount payable changes, the formal addendum process, signed by the approved delegated authority, shall apply.

#### **7. Communications**

- a) In the event that the Contract requires work with members of the public, the Contractor shall take the necessary measures to respect the spirit and intent of the Official Languages Act to communicate with the public in the official language (i.e., English or French) of their choice;
- b) Any person, including individual researchers, related to the Contractor shall ensure that, as appropriate, announcements, services, documents, conferences, meetings, workshops, etc., be in both official languages, that community members of both official languages be encouraged to participate in its activities, projects or programs and that its activities, projects or programs will meet the needs of the two linguistic communities.

#### **8. Compliance with Applicable Laws**

The Contractor shall comply with all laws applicable to the performance of the Work or any part thereof including, without limitation, all laws concerning health and labour conditions and the protection of the environment, and shall require compliance therewith by all of its subcontractors. Evidence of compliance with such laws shall be

#### **9. Confidentiality**

- a) The Contractor shall keep confidential all information provided to the Contractor by or on behalf of the Partnership in connection with the Work, or acquired by the Contractor in the course of performing the work. The Contractor shall not disclose the information to any person without the written permission of the Partnership, except that the Contractor may disclose to a subcontractor, authorized in accordance with this Contract, information necessary for the performance of the subcontract. The Contractor shall treat as confidential and cause to those to whom it shares such information, during as well as after the performance of any work under this Contract, any information to which the Contractor becomes privy as a result of acting under the Contract.
- b) This section does not apply to any information that:
  - i. is publicly available from a source other than the Contractor; or
  - ii. is or becomes known to the Contractor from a source other than the Partnership, except any source that is known to the Contractor to be under an obligation to the Partnership not to disclose the information.
- c) Upon request, the Contractor shall return to the Partnership all information provided to the Contractor by or on behalf of the Partnership or acquired by the Contractor in connection with the work and any copies of the information, in any form whatsoever.

#### **10. Conflict of Interest and Government Contracting**

- a) The Contractor declares that the Contractor has no interest in the business of any third party that would cause a conflict of interest or seem to cause a conflict of interest in carrying out the Work. Should such an interest be acquired during the life of the Contract, the Contractor shall declare it immediately to the Partnership.
- b) It is a term of this Contract that no individual, for whom the post-employment provisions of the *Conflict of Interest and Post-Employment Code for Public Office Holders* or the *Conflict*



*of Interest and Post-Employment Code for the Public Service* apply, shall derive a direct benefit from this Contract unless that individual is in compliance with the applicable post-employment provisions.

- c) The Contractor certifies that the Contractor and the Contractor's officers, agents and employees, are not prohibited under subsection 750(3) of the Criminal Code from benefiting from a government contract.
- d) No member of the House of Commons or the Senate shall be admitted to any share or part of this Contract or to any benefit to arise therefrom.
- e) The Contractor represents and covenants that no bribe, gift, benefit, or other inducement has been or will be paid, given, promised or offered directly or indirectly to any official or employee of the Partnership or to a member of the family of such a person, with a view to influencing the entry into the Contract or the administration of the Contract.

#### **11. Contractor Status**

This is a Contract for the performance of the Work and the Contractor is engaged under the Contract as an independent contractor for that purpose. Neither the Contractor nor any of the Contractor's personnel is engaged as an employee, servant or agent of the Partnership. The Contractor agrees to be solely responsible for any and all payments or deductions required to be made including those required for Canada or Quebec Pension Plans, Unemployment Insurance, Workmen's Compensation, or Income Tax.

#### **12. Dispute Resolution**

In the event that either of the Parties has a dispute relating to any matter subject to this Contract, the Parties agree to deal with that dispute through court action.

#### **13. Entire Contract**

The Contract constitutes the entire agreement between the Parties with respect to the subject matter of the Contract and supersedes all previous negotiations, communications and other agreements relating to it unless they are incorporated by reference in the Contract.

#### **14. Further Assurances**

The Parties will agree to do, execute and deliver, or cause to be done, executed and delivered, all such further assignments, documents, instruments, transfers, acts, deeds, matters, assurances and things as, from time to time, may be reasonably necessary or desirable to give effect to this Contract and the obligations of the Parties hereunder.

#### **15. Indemnification**

- a) The Contractor indemnifies and saves harmless the Partnership and its servants and agents from and against all claims, losses, damages, costs, expenses, actions and other proceedings, made, sustained, brought, prosecuted, threatened to be brought or prosecuted, in any manner based upon, occasioned by or attributable to any injury to or death of a person or damage to or loss of property arising from any willful or negligent act, omission or delay on the part of the Contractor, the Contractor's servants or agents in performing the Work or as a result of the Work, and any liens, attachments, charges or other encumbrances or claims upon or in respect of any materials, parts, work-in-process or finished work furnished to, or in respect of which any payment has been made by the Partnership.
- b) The Contractor shall carry appropriate commercial liability, errors and omissions, professional liability and other insurance which relates to the subject matter hereof in amounts and form satisfactory to the Partnership and, at the Partnership's request and expense, which provide that the Partnership is a named insured.
- c) The Contractor indemnifies the Partnership and its servants and agents from all costs, charges and expenses whatsoever that the Partnership sustains or incurs in or about all claims, actions, suits and proceedings for the use of the invention claimed in a patent, or infringement or alleged infringement of any patent or any registered industrial design or any copyright or trade secret resulting from the performance of the Contractor's obligations under the Contract, and in respect of the use of or disposal by the Partnership of anything furnished pursuant to the Contract.
- d) The Contractor's obligation of indemnity or reimbursement of the Partnership under the Contract shall not affect or prejudice the Partnership from exercising any other rights it



has under law.

- e) The Contractor acknowledges that it, he or she, is not an employee, servant or agent of the Partnership or the Minister and will not represent or hold itself, himself or herself, out to third parties in that capacity. To the extent that any third party, in reliance upon representations by the Contractor, considers the Contractor to be an agent or employee of the Partnership, the Contractor indemnifies the Partnership for any loss or damages and costs occasioned thereby by such third party.

#### **16. Injury on Duty**

The Partnership shall assume no liability for injury on duty while the Contractor is performing tasks related to this Contract except to the extent caused by or due to the Partnership. It is the Contractor's responsibility to ensure that proper insurance coverage is in place prior to the commencement of the Work.

#### **17. Inspection of the Work**

- a) The Work and any and all parts thereof shall be subject to such inspection as the Partnership determines to be appropriate, consistent with the relevant provisions of the Contract, if any, prior to acceptance. The Partnership or its representatives, shall have access to the Work at any time during working hours at any site where any part of the Work is being carried out and may make examinations and such tests of the Work as they may think fit. Should the Work or any part thereof not be in accordance with the requirements of the Contract, the Partnership shall have the right to reject the Work and require its correction or replacement at the Contractor's expense. The Partnership shall inform the Contractor of the reasons for any such rejection.
- b) The Contractor shall provide all assistance and facilities, test pieces, samples and documentation that the Partnership may reasonably require for the carrying out of any such inspection, and the Contractor shall forward such test pieces and samples to such person or location as the Partnership may direct. Inspection by the Partnership shall not relieve the Contractor from responsibility to meet the requirements of the Contract.

- c) No part of the Work shall be submitted for acceptance or delivery until it has been inspected and approved by the Contractor and, wherever practicable, marked with an approval stamp satisfactory to the Partnership. The Contractor shall keep accurate and complete inspection records which shall, upon request, be made available to the Partnership, which may make copies thereof and take extracts therefrom during the performance of the Contract and for any period of time thereafter provided for in the Contract.

#### **18. Intellectual Property**

- a) Intellectual property developed for the Contract shall be owned by the Partnership.
- b) The Partnership shall have a nonexclusive royalty-free sub-licensable right to use any other intellectual property of the Contractor required to use the intellectual property developed for the Contract.

#### **19. Invoicing**

- a) The Contractor shall submit invoice(s) on its own forms to the Partnership, and shall include the following information:
- i. Contractor name and address;
  - ii. Number assigned by the Partnership, if any, to this Contract;
  - iii. Contractor's Invoice Number and Date;
  - iv. Name of the individual at the Partnership supervising the Contract;
  - v. Period in which services were rendered;
  - vi. Deliverables and/or milestones completed and attached (when applicable); and
  - vii. Total amount for services rendered, GST shown separately.
- b) The invoice submitted by the Contractor should include a description of the Work performed, and the time worked. The Contractor will submit invoices on a monthly basis or any other basis as indicated in the Contract.

#### **20. Language**

The parties confirm it is their wish that the Contract be drawn up in the English Language.

#### **21. Law of the Contract**

The Contract shall be construed in accordance with the laws of the Province of Ontario and the laws of Canada applicable therein. It is agreed that both parties shall submit to the



jurisdiction of the courts sitting in Toronto, Ontario.

## 22. Minimum Information in the Contract

The Contract shall include the following minimum information:

- a) a description of the Work to be provided including a budget and a description of the costs to be paid;
- b) the effective date, the date of signing and the term of the Contract;
- c) conditions that must be met before payment is made and the schedule and basis of payment; and
- d) the maximum amount payable.

In the event that at any time it is discovered that the Contract does not contain all or any part of the minimum information required, the parties shall use their best efforts in good faith to amend the Contract to include the information that is missing.

## 23. Notices

Where in the Contract any notice, request, direction, or other communication is required to be given or made by either Party, it shall be in writing and is effective if delivered in person, sent by any means including electronic means addressed to the party for whom it is intended at the address mentioned in the Contract and any notice, request, direction or other communication shall be deemed to have been given if by registered mail, when the postal receipt is acknowledged by the other party; or by any other means when the receipt is acknowledged by the other party. The address of either party may be changed by notice in the manner set out in this provision.

## 24. Payment

- a) Payments under this Contract, except advance payments, shall be conditional upon performance, completion and delivery of the Work, or any part of the Work to the satisfaction of the Partnership, and upon submission of an invoice satisfactory to the Partnership.
- b) Subject to the section "Invoicing", payment by the Partnership for the Work shall be made within sixty (60) days of receipt of an invoice requesting payment.

- c) If the Partnership has any reasonable objection whatsoever to an invoice, the supporting documentation, or the performance of the Contract by the Contractor, then the Partnership shall, within fifteen (15) days of receipt of the invoice or as quickly as reasonably possible, notify the Contractor of the nature of the objection..
- d) Notwithstanding any other provision of the Contract, no payment shall be made to the Contractor unless and until, with respect to all parts of the Work in respect of which payment is claimed, the Contractor, where required to do so, establishes to the satisfaction of the Partnership that such parts of the Work will be free from all claims, liens, attachments, charges or encumbrances.

## 25. Powers of the Partnership

Every right, remedy, power and discretion vested in or acquired by the Partnership under the Contract or by law shall be cumulative and non-exclusive.

## 26. Proactive Disclosure

- a) Information contained in this Contract in relation to the following data elements - vendor name, reference number, Contract date, description of work, Contract period or delivery date, and Contract value, may be gathered, and may be posted on the Partnership web site. Information that would normally be withheld under the *Access to Information Act* and *Privacy Act* will not appear on the web site.
- b) This "public disclosure" is intended to ensure that Contract information is collected and presented consistently in a manner that promotes transparency and facilitates public access.

## 27. Reporting

- a) The Contractor shall provide the Partnership such progress reports, including financial matters, as are called for on the work under the Contract and, in any event, no less frequently than annually for the period ending March 31 of each year. Unless otherwise provided in the Contract, the form and substance of the progress report shall be acceptable to the Partnership.
- b) The Partnership may, in its sole discretion, require the Contractor to provide an interim



progress report on the work under the Contract for a specified period of time (no more than a 12 month period)

### **28. Severability**

If any provision of the Contract is declared by a court of competent jurisdiction to be invalid, illegal or unenforceable, such provision shall be severed from the Contract and all other provisions of the Contract shall remain in full force and effect.

### **29. Status and Replacement of Personnel**

- a) If at any time during the period of the Contract the Contractor is unable to provide the services of any person who was to perform the Work in the Contract, it shall immediately advise the partnership and provide a replacement person with similar qualifications and experience.
- b) The Partnership may reject any such replacement person and the Contractor shall immediately remove the person from the Work and shall secure a further replacement.
- c) The fact that the Partnership does not order the removal of a replacement person from the Work shall not relieve the Contractor from its responsibility to meet the requirements of the Contract.

### **30. Subcontracting**

- a) Unless otherwise provided in the Contract, the Contractor shall obtain the consent of the Partnership in writing prior to subcontracting or permitting the subcontracting of any portion of the Work at any tier. The Partnership shall not unreasonably withhold consent.
- b) The Contractor is not obliged to seek consent to subcontracts specifically authorized in the Contract.
- c) Any consent to a Subcontract shall not relieve the Contractor from its obligations under the Contract or be construed as authorizing any liability on the part of the Partnership to a subcontractor.

### **31. Successors and Assignees**

The Contract shall be for the benefit of and be binding upon the parties hereto and their lawful heirs, executors, administrators, successors and assignees.

### **32. Survival**

Those terms and conditions that ought reasonably to survive the termination of this Agreement, shall so survive termination including, without limitation, Sections 3, 9, 15, 18, 33 and 34.

### **33. Termination Due to Default of Contractor**

- a) The Partnership may, by notice to the Contractor, terminate the whole or any part of the Work if:
  - i. the Contractor becomes bankrupt or insolvent, or a receiving order is made against the Contractor, or an assignment is made for the benefit of creditors, or if an order is made or resolution passed for the winding up of the Contractor, or if the Contractor takes the benefit of any statute for the time being in force relating to bankrupt or insolvent debtors, or
  - ii. the Contractor fails to perform any of the Contractor's obligations under the Contract, or, in the view of the Partnership, so fails to make progress as to endanger performance of the Contract in accordance with its terms.
- b) In the event that the Partnership terminates the Work in whole or in part under sub-section a), the Partnership may arrange, upon such terms and conditions and in such manner as the Partnership deems appropriate, for the work to be completed that was so terminated, and the Contractor shall be liable to the Partnership for any excess costs relating to the completion of the Work.
- c) Upon termination of the work under sub-section a), the Partnership may require the Contractor to deliver and transfer title to the Partnership, in the manner and to the extent directed by the Partnership, any finished work which has not been delivered and accepted prior to such termination and any materials or work-in-process which the Contractor has specifically acquired or produced for the fulfillment of the Contract. The Partnership shall pay the Contractor for all such finished work delivered pursuant to such direction and accepted by the Partnership, the cost to the Contractor of such finished work plus the proportionate part of any fee fixed by the said Contract and shall pay or reimburse the Contractor the fair and reasonable cost to the Contractor of all materials or work-



in-process delivered to the Partnership pursuant to such direction. The Partnership may withhold from the amounts due to the Contractor such sums as the Partnership determines to be necessary to protect the Partnership against excess costs for the completion of the Work. Such termination shall not impact the intellectual property rights available from Contractor under section 18 as in existence to the date of termination.

- d) The Contractor shall not be entitled to be reimbursed any amount which, taken together with any amounts paid or becoming due to the Contractor under the Contract, exceeds the Contract Amount applicable to the Work or the particular part thereof.
- e) If, after the Partnership issues a notice of termination under sub-section a), it is determined by the Partnership that the default of the Contractor is due to causes beyond the control of the Contractor, such notice of termination shall be deemed to have been issued pursuant to the section entitled “termination or Suspension Without Cause” and the rights and obligations of the parties hereto shall be governed by that section.

#### **34. Termination or Suspension Without Cause**

- a) The Partnership may, by giving notice to the Contractor, terminate or suspend the Work with respect to all or any part or parts of the Work not completed. The Contractor shall proceed to complete parts of the Work not affected by the termination notice. Additional notices for different parts of the Contract may be given subsequently.
- b) All work completed by the Contractor to the satisfaction of the Partnership based on the provisions of the contract before the giving of such notice shall be paid for by the Partnership in accordance with the provisions of the Contract.
- c) All Work not completed before the giving of such notice shall be paid by the Partnership to the Contractor on the following terms:
  - i. the amount of any capital expenditures actually incurred only if they were specifically authorized under the Contract or approved in writing by the Partnership for the purpose of the Contract, less any depreciation in respect thereof already taken into account

in determining cost, to the extent that the capital expenditures are properly apportionable to the performance of the Contract;

- ii. all costs of and incidental to the termination of the Work or part thereof, including the cost of cancellation of obligations incurred by the Contractor with respect to the terminated work or part thereof; but not including the cost of severance payments or damages to employees whose services are no longer required by reason of the termination.
- d) Payment and reimbursement under the provisions of this section shall be made only to the extent that it is established to the satisfaction of the Partnership that the costs and expenses were actually incurred by the Contractor and that the same are fair and reasonable and are properly attributable to the termination or suspension of the Work or the party thereof so terminated.
- e) The Contractor shall not be entitled to be reimbursed any amount which, taken together with any Amounts paid or becoming due to the Contractor under the Contract, exceeds the Contract Amount applicable to the Work or the particular part thereof.
- f) The Contractor shall have no claim for damages, compensation, loss of profit, allowance or otherwise by reason of or directly or indirectly arising out of any action taken or notice given by the Partnership under the provisions of this section except as expressly provided therein.

#### **35. Time of the Essence**

- a) Time is of the essence of the Contract.
- b) Any delay by the Contractor in performing the Contractor's obligations under the Contract which is caused by an event beyond the control of the Contractor, and which could not have been foreseen and could not have been avoided by the Contractor by means reasonably available to the Contractor, constitutes an excusable delay. Events may include, but are not restricted to: acts of God, acts of Her Majesty, acts of local or provincial governments, fires, floods, epidemics, quarantine restrictions, strikes or labour unrest, freight embargoes and unusually severe weather.
- c) The Contractor shall give notice to the Partnership immediately after the occurrence of





the event that causes the excusable delay. When requested to do so by the Partnership, the Contractor shall deliver a description in a form satisfactory to the Partnership, of work-around plans including alternative sources and any other means that the Contractor will utilize to overcome the delay and endeavour to prevent any further delay. Upon approval in writing by the Partnership of the work-around plans, the Contractor shall implement the Work-around plans and use all reasonable means to recover any time lost as a result of the excusable delay. Any additional costs caused by the delay shall be supported by the Contractor.

- d) Notwithstanding that the Contractor has complied with the requirements of this section the Partnership may exercise any right of termination contained in the section entitled "Termination or Suspension Without Cause."

### **36. Waivers**

The waiver by a Party of a breach of any term or condition of the Contract shall not prevent the enforcement of that term or condition by that Party in the case of a subsequent breach, and shall not be deemed or construed a waiver of any subsequent breach.

### **37. Warranty**

- a) Notwithstanding inspection and acceptance of the Work by or on behalf of the Partnership and without restricting any other provision of the Contract or any condition, warranty or provision implied or imposed by law, the Contractor warrants that, for a period of 12 months from the date of delivery, or if acceptance takes place on a later date, the date of acceptance, the Work shall be free from all defects in design, materials or workmanship, and shall conform with the requirements of the Contract, provided that with respect to property provided by the Partnership, the Contractor's warranty shall extend only to its proper incorporation into the Work. In addition, the Contractor has the obligation to respect any other warranty provided for by law.
- b) In the event of a defect or non-conformance in any part of the Work during the warranty period defined in paragraph a) the Contractor, at the request of the Partnership to do so, shall as soon as possible repair, replace or otherwise make good at its own option and expense the part of the Work found to be defective or not in conformance with the requirements of the Contract.

VERSION – February 2012 MDM