

Alberta Education and Advanced Education and Technology

REQUEST FOR QUALIFICATIONS (RFQ)

Strategic Services Division
Contracted and Project Management Services Branch
19th Floor, Commerce Place
10155 102 Street
Edmonton, Alberta T5J 4L5

**Performance Measurements and
Planning Consultative Services**

RFQ No. AE-05-24

	RFQ Issue Date: February 20, 2009 Submission Period: Ongoing: up to 4:00:59 p.m., Alberta Time on February 18, 2011 RFQ Administrator: ShirleyAnn Goski Phone: (780) 415-2227 Fax: (780) 415-6546 E-mail: Contracting.Admin@education.gov.ab.ca
--	--

Vendors may obtain this document directly from the RFQ Administrator.
Responses must be sent by e-mail (i.e., Word or PDF format for text), and three (3) print versions must also be sent. Vendors are encouraged to review section 2.4 for an explanation of the proposed schedule of events.

TABLE OF CONTENTS

1.	<i>Definitions</i>	1
2.	<i>Introduction</i>	3
2.1	Preamble	3
2.2	Project Invitations	4
2.3	Contracts	4
2.4	Proposed Schedule of Events	5
3.	<i>RFQ Requirements</i>	5
3.1	Background	5
3.2	Tasks and Deliverables	6
3.3	Mandatory Requirements	7
3.4	Desirable Criteria	7
4.	<i>Response Guidelines</i>	8
5.	<i>Response Evaluation</i>	9
5.1	Process and Sequence	9
5.2	Evaluation Criteria	9
6.	<i>RFQ Administration Terms and Conditions</i>	10
6.1	Vendor Questions	10
6.2	Confidentiality	11
6.2.1	Confidentiality and Security of Information	11
6.2.2	FOIP and Collection of Personal Information	11
6.2.3	Protection of Privacy	12
6.3	Data Storage and Security	12
6.4	Computers, Software, Parking, Secretarial Services, Travel, Expenses and Insurance	13
6.5	Reporting	13
6.6	Trade Agreements	13
6.7	Lobbyist Act	13
6.8	Copyright	14
6.9	Conflict of Interest	14
6.10	Irrevocability of Responses	14
6.11	Removal from Resource List	14
6.12	Response Rejection	14
6.13	Vendor Expenses	14
6.14	Response Returns	15
6.15	Vendor Debriefing	15
6.16	Further Information	15
7.	<i>Response Package</i>	16

1. DEFINITIONS

Vendors are advised to pay careful attention to the wording used throughout this Request for Qualifications (RFQ). Failure to satisfy any term or condition of this RFQ may result in an unacceptable Response.

Throughout this RFQ, terminology is used as follows:

Advanced Education and Technology means Her Majesty the Queen in Right of Alberta as represented by the Minister of Advanced Education and Technology.

Alberta Time means Mountain Standard Time or Daylight Saving Time as provided for in the *Daylight Saving Time Act* of Alberta.

APC means the Alberta Purchasing Connection (www.purchasingconnection.ca), the service used by the Government of Alberta that provides an open and competitive marketplace to advertise business opportunities, release open bidding opportunities and support the procurement process.

Business Day means 8:15 a.m. to 4:30 p.m., Alberta Time, Monday to Friday, excluding statutory holidays observed by Alberta Education.

Business Hours mean 8:15 a.m. to 4:30 p.m., Alberta Time, on Business Days.

Consortium means two or more individuals and/or organizations that together submit a Response.

Contract means a written agreement between a Pre-qualified Vendor(s) and one or both of the Ministries to provide the Services.

Evaluation Team means the individuals who, on behalf of the Ministries, will evaluate Responses to this RFQ.

Expertise means knowledge, skills and/or experience gained through post-secondary education, employment, voluntary activities and continuous learning.

FOIP means the *Freedom of Information and Protection of Privacy Act* of Alberta, R.S.A. 2000, c. F-25, as amended, revised or substituted from time to time.

Legal Name means the name under which a Vendor is legally registered and under which a Contract would be issued. A Legal Name may be the name of an individual if that individual has not registered a different name for his or her business with the appropriate provincial registry.

Ministries mean Alberta Education, and/or Advanced Education and Technology.

must, mandatory, required, will and shall mean a requirement that must be met in order for the Response to receive consideration.

Personal Information means recorded information about an identifiable individual defined in section 1(n) of *FOIP*, R.S.A. 2000, c. F-25, as amended.

Pre-qualified Vendor means a Vendor that is selected pursuant to this RFQ to be placed on the Resource List.

Prime Vendor means the individual or organization in a Consortium that is responsible for the provision of all Services and is accountable for all terms and conditions of a Contract.

Project Invitation means a written request by Alberta Education or Advanced Education and Technology to one or more Pre-qualified Vendors to submit a Proposal for the provision of some or all of the Services, in order to be considered for a Contract.

Proposal means the submission from a Pre-qualified Vendor in response to a Project Invitation.

Resource List means the list of Pre-qualified Vendors established as a result of this RFQ, and which the Ministries may use to offer a Contract(s) for the Services.

Response means the Vendor's completed Response Package and includes all of the Vendor's attachments.

Response Package means the forms that Vendors must complete and return to Alberta Education for evaluation, as described in section 4.

Review Date means the date when the Evaluation Team will review Responses, as described in section 2.4.

RFQ means this Request for Qualifications document and associated documentation and appendices.

RFQ Administrator means the person named in this RFQ as the contact person or his/her delegate.

Services mean one or more of the tasks and deliverables described in section 3.2.

should, may and desirable mean a criterion that is not mandatory, but which has a significant degree of importance to the objectives of this RFQ.

Signing Authority means the individual who has the legal authority to enter into Contracts on behalf of a Vendor.

Submission Period means the period of time, as further described in section 2.4, when Responses can be received in order for Vendors to be evaluated.

Vendor means an individual, organization or Consortium providing a Response to this RFQ.

Vendor's Resource(s) means the personnel assigned by the Vendor to provide the Services pursuant to a Contract, and includes its employees, subcontractors and agents.

References to "Alberta Education", "Advanced Education and Technology", "Government of Alberta", "Her Majesty" "Minister", "Ministry", and "Ministries" mean "Her Majesty the Queen in Right of Alberta" and are only used for administrative purposes.

Headings are used for convenience only, and they do not affect the meaning or interpretation of the clauses.

Words in the singular include the plural and vice versa.

2. INTRODUCTION

2.1 Preamble

The purpose of this RFQ is to establish a Resource List of highly skilled Pre-qualified Vendors to provide Services to the Ministries. Vendor Responses will be reviewed for compliance with the mandatory requirements in section 5.2. After all Responses are reviewed, the Resource List will be established, and Alberta Education will maintain the Resource List as one method by which the Ministries will enter into Contracts on an "as needed" basis. **Placement on the Resource List does not constitute a guarantee of any work to any Pre-qualified Vendor.**

Pre-qualified Vendors will remain pre-qualified for a period of two (2) years after being placed on the Resource List, and the Pre-qualified Vendors will be informed of the expiry date of their pre-qualification when they are notified of their status.

Alberta Education intends to maintain and augment the Resource List by accepting Responses on an ongoing basis from Vendors. It is the intention of Alberta Education to evaluate Responses and add Pre-qualified Vendors in accordance with the process described in section 2.4. **Pre-qualified Vendors are encouraged to resubmit Responses before the pre-qualification period expires to ensure that they remain active on the Resource List and to ensure that their information remains current and accurate.**

Alberta Education reserves the right to re-evaluate and amend the requirements for the Resource List as outlined in this RFQ, and may issue a new RFQ at any time during the period a Vendor is pre-qualified.

All branches in the Ministries that require similar Services to those outlined in this RFQ may access the Resource List as one method by which to enter into Contracts on an “as needed” basis. Any Contracts offered to Pre-qualified Vendors by the Ministries will be bound by the terms and conditions of this RFQ. The Ministries reserve the right, at their sole discretion, to share these Resource Lists with other Government of Alberta departments requiring similar services.

2.2 Project Invitations

Pre-qualified Vendors will be eligible to respond to subsequent Project Invitations. Vendors entering into Contracts will be bound by the terms and conditions of this RFQ.

When issuing Project invitations the Ministries will, wherever possible, invite at least three (3) Pre-qualified Vendors to submit Proposals. The Project Invitation will describe the specific scope of work and competition requirements, which may include, but is not limited to, timelines, deliverables, evaluation process and criteria, and an approximate budget.

The Ministries will evaluate all compliant Proposals, and may enter into a Contract with a Pre-qualified Vendor.

The Ministries reserve the right to interview Pre-qualified Vendors, to contact supplied references and/or a security clearance check, in order to assess the Pre-qualified Vendor’s suitability for a particular project. The Ministries reserve the right to refuse the Services of a Pre-qualified Vendor should the interview and/or reference checks, and/or security clearance check prove unfavourable in the opinion of the Ministries, acting reasonably.

2.3 Contracts

Vendors selected as Pre-qualified Vendors pursuant to this RFQ will be eligible to be awarded one or more Contracts for the period in which they are pre-qualified. Pre-qualified Vendors that are awarded a Contract(s) shall retain their Pre-qualified Vendor status and may be considered for other Contract(s) as needs arise.

Participation in this RFQ neither adversely affects nor bars the Vendor, whether pre-qualified or otherwise, from participating in other procurement activities of the Ministries.

Nothing in this RFQ process is intended to lessen the subsequent competition among the Pre-qualified Vendors when a Project Invitation is issued.

As much as possible, and subject to availability of Pre-qualified Vendors and to specific project needs, Contracts arising from Project Invitations will be distributed among Pre-qualified Vendors on the Resource List.

There is no guarantee that Pre-qualified Vendors will obtain any volume of work, nor is there any guarantee that Pre-qualified Vendors who are invited to respond to Project Invitations will be offered Contracts. Further, notwithstanding that a Resource List may have been established, the Ministries reserve the right to conduct an open competition for any Services that are contemplated by this RFQ.

Pre-qualified Vendors may, at the discretion of the Ministries, lose their pre-qualification status for unsatisfactory performance and/or misrepresentation of expertise.

2.4 Proposed Schedule of Events

RFQ Issue Date:

February 20, 2009

Submission Period:

Ongoing: submissions to this RFQ can be made at any time up to 4:00:59 P.M. Alberta Time on February 18, 2011.

Notification to Vendors of the evaluation results will be e-mailed within five (5) Business Days of the Review Date.

Alberta Education will accept Responses on an ongoing basis for review by the Evaluation Team. Review Dates will occur on or before the final Business Day of each month, with a final Review Date occurring on or before February 28, 2011.

The Ministries reserve the right to deactivate the Resource List at any time. Pre-qualified Vendors will be advised in writing if such deactivation occurs.

The Ministries reserve the right to:

- review Responses at any time, if required;
- close this RFQ at any time; and
- refuse to accept any additional Responses.

The above dates are subject to change without notice at the sole discretion of Alberta Education.

3. RFQ REQUIREMENTS

3.1 Background

The Ministries are responsible for ensuring that the province continues to have one of the most accessible, responsive, innovative and economically viable learning systems in the world to ensure that all Albertans are prepared for lifelong learning, work and citizenship.

One key component to ensuring the continued success of the learning system is well-informed, planned, and consultative Ministries. As such, specific areas of the Ministries are responsible for facilitating the Ministries' planning and decision making activities, including strategic planning, knowledge management, business planning, operational planning, performance measurement, and risk management processes and information. These areas also provide consultation expertise and implement Ministry-wide consultations.

In order to improve planning, measurement, reporting and accountability in the Ministries, the Ministries sometimes engage consultants to provide expertise and consultation in these areas.

3.2 Tasks and Deliverables

The Ministries require experienced Vendors to complete **one or more** of the following tasks and deliverables:

- Develop and provide reviews (e.g. literature review and/or document review and analysis, identification of best practices) and/or evaluations of planning processes and tools including strategic, business and operational planning, environmental scanning, issues management, knowledge management, risk management and/or public consultation.
- Develop projections or models based on economic and labour market statistics or other data to forecast future requirements for occupational demand and/or post-secondary spaces required.
- Prepare and submit written or oral reports detailing a new planning process or tool or providing the findings of a review/evaluation of a planning process or tool after implementation.
- Prepare and submit recommendations for enhancing current planning processes and tools and/or improving project organization.
- Provide expertise and/or facilitation in strategic planning, business planning, operational planning, accountability, performance measurement and/or risk management.
- Assist in the development of strategic plans, performance measures, targets and/or reports.
- Coordinate performance measures development workshops, collection and analysis of measurement data.
- Prepare and submit minutes of meetings, reports that include a working committee's review and comments in respect to draft materials presented on behalf of the Ministries, and/or recommendations that occur as a result of an event.
- Develop, plan, and/or execute a planning process or tool in support of the Ministries' projects, initiatives and activities relating to strategic, business and/or operational planning, environmental scanning, issues management, knowledge management, risk management and/or public consultation.
- Facilitate group discussions, including executive level staff, for the purposes of developing and implementing planning processes and tools.
- Develop electronic templates for planning and reporting.
- Design accountability report cards and/or reporting formats.
- Integrate planning and reporting systems/processes and tools.

3.3 Mandatory Requirements

To be pre-qualified, Vendors **must** meet the following requirements:

1. Experience in one or more the following areas:
 - i. strategic, business and operational planning, and/or
 - ii. environmental scanning, and/or
 - iii. issues management, and/or
 - iv. knowledge management, and/or
 - v. risk management, and/or
 - vi. public consultation practices, and/or
 - vii. accountability frameworks, and/or
 - viii. developing and implementing performance measurement tools, and/or
 - ix. evaluation of performance measurement tools, AND
2. Experience in research practices in conducting reviews/evaluations, AND
3. Experience directing project organization, AND
4. Experience in facilitating meetings/events, AND
5. Provide the names of three (3) references. Documentation should include contact information, job title (if applicable) and relationship to the Vendor, AND
6. Have experience using the Microsoft Office suite of applications (e.g., Word, PowerPoint, Excel) in a Windows environment, AND
7. Have hardware and software to produce materials to be used and archived within a Windows environment, AND
8. Have reliable Internet access and e-mail.

3.4 Desirable Criteria

In addition, the following desirable criteria have a significant degree of importance. Vendors **should**:

- a) Possess a related post-secondary degree from a recognized university, OR
- b) Be familiar with Government of Alberta performance measures and/or specifically performance measures of the kindergarten to grade 12 and post-secondary learning system contexts, OR
- c) Have experience with other comparable educational jurisdictions (e.g., other governments, school authorities, governing bodies), OR
- d) Have experience in the field of international education, OR
- e) Have experience in modeling or forecasting trends, OR
- f) Have experience preparing meeting materials, OR
- g) Have experience with project management, including performance measurements and providing deliverables on time, within budget and within specifications, OR
- h) Be fluent in English and French (oral and written), OR
- i) Have oral and/or written fluency in multiple languages, OR
- j) Have experience working with First Nations, Métis or Inuit communities and/or organizations on related projects, OR
- k) Have knowledge and understanding of First Nations, Métis or Inuit histories, languages, cultures and communities in Alberta, OR
- l) Be willing to attend meetings in Edmonton as required, and/or participate in teleconference or videoconference meetings upon 48 hours notice, OR
- m) Be willing and able to travel to meet project requirements.

4. RESPONSE GUIDELINES

Vendors must complete and return the entire Response Package, as required, to Alberta Education, in order to be considered for the Resource List. Any additional information provided as attachments may be reviewed when a Pre-qualified Vendor is being considered for a Project Invitation. Vendors may include additional attachments, **but those attachments will not be evaluated**. Vendors may respond to this RFQ as an individual, organization or as a Consortium.

Vendors may request a Word version of the Response Package from the RFQ Administrator, or they may access the Word version on the APC. Responses should be typed or computer generated.

Responses must be delivered electronically (e-mail) **and** by print copy (hand, courier, or mail).

In responding to this RFQ:

- a. The Response Package must be completed and the Vendor or Prime Vendor must sign the cover page. If the Vendor is a Consortium, each additional member of the Consortium must complete and sign the Attachment.
- b. Print Responses received unsigned will be rejected.
- c. Responses received will be held in a secure location and will **not** be released to the Evaluation Team until the next Review Date.
- d. Ambiguous, unclear or unreadable Responses may be cause for rejection.
- e. Responses should be sealed, dated and clearly marked with the RFQ number and must be delivered to the following location:

Attention: ShirleyAnn Goski
RFQ Administrator
Contracted and Project Management Services
Strategic Services Division
Alberta Education
19th Floor, Commerce Place
10155-102 Street
Edmonton, Alberta T5J 4L5

- f. Electronic Responses should have the RFQ number in the subject line and must be sent to Contracting.Admin@education.gov.ab.ca.
- g. Vendors must submit three (3) print versions of the Response.

The required three (3) print versions and the electronic version of the Response, and all other related documentation, must be received before the Review Date. In the event of discrepancies between the print version and the electronic version, **the version received first shall govern**.

The Ministries are not responsible for failures (technical or otherwise) that may result in the Responses not being received prior to a Review Date or prior to the end of the Submission Period.

5. RESPONSE EVALUATION

5.1 Process and Sequence

Each Response will be evaluated separately against the RFQ mandatory requirements.

All Vendors that meet the mandatory requirements will be classified as Pre-qualified Vendors and placed on the Resource List.

The desirable criteria described in this RFQ constitute additional information that will be used to determine which Pre-qualified Vendors are approached for each specific project as it arises. **The desirable criteria will not be evaluated by the Evaluation Team or used to determine placement on the Resource List.**

There is no pre-determined limit to the number of Vendors who will pre-qualify pursuant to this RFQ.

The Resource List will be available to all branches of the Ministries seeking these Services.

5.2 Evaluation Criteria

Responses will be evaluated on the following mandatory administrative requirements:

Mandatory Administrative Requirements¹	Yes	No
Response received by 4:00:59 p.m. Alberta Time, February 18, 2011 (see section 2.4).	☐	☐
Response received electronically e-mailed to: Contracting.Admin@education.gov.ab.ca	☐	☐
Three (3) print versions of the Response are received.	☐	☐
Response cover page is signed by the Vendor or Prime Vendor.	☐	☐
Attachment is completed and signed by each member of the Consortium (if applicable).	☐	☐
Entire Response Package is submitted.	☐	☐

Those Responses that meet all of the mandatory administrative requirements will be released to the Evaluation Team and will be evaluated on the following mandatory requirements:

¹ Alberta Education reserves the right to waive any of the mandatory administrative requirements, when deemed in the best interest of the Ministries.

Mandatory Requirements	Yes	No
Experience in one or more the following areas, including the development, implementation and evaluation of processes or tools: i. strategic, business and operational planning ii. environmental scanning iii. issues management iv. knowledge management v. risk management vi. public consultation practices vii. accountability frameworks viii. developing and implementing performance measurement tools ix. evaluation of performance measurement tools	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Experience in accepted research practices in conducting reviews/evaluations.	☐	☐
Experience in directing project organization.	☐	☐
Experience in facilitating meetings/events.	☐	☐
Names of three (3) references are provided. Documentation should include, contact information, job title (if applicable) and relationship to the Vendor.	☐	☐
Experience using the Microsoft Office suite of applications (Word, PowerPoint, Excel, etc) in a Windows environment.	☐	☐
Have hardware and software to produce materials to be used and archived within a Windows environment.	☐	☐
Have reliable Internet access and e-mail.	☐	☐

6. RFQ ADMINISTRATION TERMS AND CONDITIONS

6.1 Vendor Questions

In order for Alberta Education to deal effectively with Vendor questions or concerns about any term, condition or requirement of this RFQ, such questions or concerns must be communicated in writing to the RFQ Administrator. Enquiries and responses will be recorded and may, at Alberta Education's discretion, be published on the APC.

The Vendor is responsible for notifying the RFQ Administrator in writing of any ambiguity, divergence, error, omission, oversight, contradiction, or item subject to more than one interpretation in the RFQ, as it is discovered, and to request any instruction, decision or direction required to prepare the Response.

Verbal responses to enquiries are not binding on any party.

Questions may be directed to ShirleyAnn Goski at Contracting.Admin@education.gov.ab.ca.

6.2 Confidentiality

6.2.1 Confidentiality and Security of Information

The Vendor shall:

- a. keep strictly confidential all information concerning the Ministries and/or third parties, or any of the business or activities of the Ministries and/or third parties acquired as a result of participation in this RFQ; and
- b. only use, copy or disclose such information as necessary for the purpose of submitting a Response or upon written authorization of the Ministries; and
- c. maintain security standards, including control of access to data and other information, consistent with the highest standards of business practice in the industry.

6.2.2 FOIP and Collection of Personal Information

The purpose of collecting the Personal Information requested in this RFQ is to enable the Ministries to ensure the accuracy and reliability of the Vendor's Response and to enable the Ministries to evaluate the Vendor's Response to this RFQ. Authority for this collection is section 33(c) of *FOIP*.

FOIP applies to all information and records relating to, or obtained, generated, created, collected or provided under, the RFQ and/or the Contract(s) and which are in the custody or control of the Ministries.

All documents submitted to the Ministries are governed by the access and privacy provisions of *FOIP*. While *FOIP* allows persons a right of access to records in the Ministries' custody or control, it also prohibits the Ministries from disclosing Personal Information or confidential business information. This prohibition takes effect if disclosure would be significantly harmful to a Vendor's business interests or would be an unreasonable invasion of personal privacy as defined in sections 16 and 17 of *FOIP*. Vendors are encouraged to identify those portions of their submissions that they are submitting in confidence and which, if revealed, would harm the business interests of the Vendor.

The evaluation criteria and the process for this RFQ are public information. Individual assessments of Vendors are considered confidential and of interest to competitors or other Vendors under this RFQ. Individual assessment information will, therefore, be provided, upon request, to the Vendor to whom it relates, and to others only in accordance with *FOIP*. Information regarding the *FOIP Act* is available on the World Wide Web at <http://foip.alberta.ca>.

6.2.3 Protection of Privacy

FOIP imposes an obligation on the Ministries, and through the RFQ and related Contract(s), on the Vendor, to protect the privacy of individuals to whom information relates.

The Pre-qualified Vendor will meet the standards set by the requirements of Part 2 of *FOIP* for all Personal Information the Pre-qualified Vendor has access to, collects or uses, discloses or destroys as a consequence of carrying out obligations under a Contract(s).

By submitting Personal Information, the Vendor consents and shall obtain the consent of the Vendor's Resources to its disclosure for the purposes, stated in section 6.2.2, to verify professional standing and to conduct reference checks, if needed.

All costs associated with meeting the Vendor's requirements of *FOIP*, as set out in this RFQ, will be borne by the Vendor. All costs associated with meeting the Pre-qualified Vendor's requirements of *FOIP*, as set out in this RFQ and any subsequent Contract(s), will be borne by the Pre-qualified Vendor.

6.3 Data Storage and Security

Vendors who are offered a Contract pursuant to this RFQ may be required to meet all or part of the following requirement:

Data created, collected and/or manipulated under a Contract pursuant to this RFQ must be stored on a secure Canadian owned server in Alberta or, if necessary, on a secure server within Canada. Data will not be transported outside of Canada. Data transmitted or stored on computers, portable devices or other media must be protected using secure procedures (i.e. password protection, encryption of files, etc). The Vendor will provide the Ministries, upon request, details describing their plan for meeting the data storage and security requirement, prior to entering into a Contract.

When the Contract ends, whether through expiry or termination, the contracted Vendor will provide all data to the Ministries in a method to be determined at the time of Contract end, and the contracted Vendor will be required to delete all data from any computers, servers, portable devices or media under their control.

6.4 Computers, Software, Parking, Secretarial Services, Travel, Expenses and Insurance

Pre-qualified Vendors who enter Contracts:

- Will provide their own office space, equipment, computers, software, telephone and photocopy facilities as required, and other tools as necessary for the purpose of performing the Services. Amenities, including but not limited to secretarial services and parking, will not be provided. Onsite equipment, computers, software, telephone and photocopy facilities may be available for use when the work requires face-to-face collaboration at the Ministries' office location.
- May be required to provide evidence of a valid security clearance check, normally a background and criminal records check, on the Pre-qualified, if the Pre-qualified Vendor is an individual, or on any or all of the Pre-qualified Vendor's employees, agents or subcontractors that may be providing the Services, prior to a Contract being executed. The Ministries will be under no obligation to enter into any Contract with a Pre-qualified Vendor if, in the opinion of the Ministries, acting reasonably, the results of such a security clearance check(s) are not satisfactory.
- May be required to travel to meet contractual requirements and may be expected to attend occasional project meetings at their own expense.
- Must submit expense invoices to be reimbursed for approved expenses incurred while delivering the Services. The expense invoices must contain the Pre-qualified Vendor's name, Contract number and total expense, and attach actual receipts.
- Are required, at their own expense, to obtain insurance under a Contract of General Liability Insurance in accordance with the *Alberta Insurance Act* in an amount not less than **\$2,000,000** inclusive per occurrence insuring against bodily injury, personal injury and property damage including loss of use thereof. Such insurance shall include blanket contractual liability. Evidence of such insurance in a format acceptable to the Ministries shall be made available to the Ministries, at the Ministries' request, as a condition of any Contract(s).

6.5 Reporting

Pre-qualified Vendors who enter Contracts will be required to submit reports and deliverables as negotiated with the Ministries and as outlined in the Contract.

6.6 Trade Agreements

This RFQ is subject to the *Trade, Investment and Labour Mobility Agreement* and Chapter 5 of the *Agreement on Internal Trade*.

6.7 Lobbyist Act

The *Lobbyist Act* is scheduled to be proclaimed in 2009. The *Lobbyist Act* prohibits paid lobbyists from holding contracts with the Government of Alberta to provide paid advice on the same subject matter for which they are also a paid lobbyist.

The Contract(s) that may be awarded pursuant to this RFQ will be active when the *Lobbyist Act* is scheduled to be proclaimed. Vendors are therefore encouraged to review the *Lobbyist Act* at:

<http://www.justice.gov.ab.ca/initiatives/default.aspx?id=5165> .

Vendors considered for Contracts may be requested to provide information relating to any lobbyist activities with which they may be involved prior to a Contract being awarded. Any Contract awarded pursuant to this RFQ will be subject to the *Lobbyist Act* when it comes into effect.

6.8 Copyright

Copyright in Deliverables produced in accordance with a Contract shall belong to the Crown in Right of Alberta unless otherwise negotiated. The Vendor will also waive all moral rights to the Deliverables.

6.9 Conflict of Interest

Vendors must fully disclose in writing, to the RFQ Administrator, upon submitting a Response, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Vendor were to become a contracting party pursuant to this RFQ. The Ministries shall review any submissions by Vendors under this provision and may reject any Responses where, in the opinion of the Ministries, the Vendor could be in a conflict of interest or could be perceived to be in a possible conflict of interest position if the Vendor were to become a contracting party pursuant to this RFQ.

6.10 Irrevocability of Responses

Vendors may amend or withdraw their Responses prior to the Review Date by submitting a clear and detailed written notice to Alberta Education. All Responses become irrevocable after a Submission Date.

If the Vendor has rescinded a Response prior to the Review Date, such Response will, at the Vendor's choice, either be returned to the Vendor at the Vendor's expense, or be destroyed by the Ministries.

6.11 Removal from Resource List

Pre-qualified Vendors may ask to be removed from the Resource List at any time by submitting a clear and detailed written notice to the RFQ Administrator.

6.12 Response Rejection

Placement on the Resource List does not guarantee that the Pre-qualified Vendor will receive a Project Invitation or a Contract from the Ministries, nor does it imply that the Pre-qualified Vendor has any type of contractual or employment relationship with the Ministries either now or in the future. Further, the Ministries reserve the right to reject any or all Responses when it is in the best interest of Alberta Education.

6.13 Vendor Expenses

The Vendor is responsible for all costs of preparing their Response, preparing a Proposal in response to a Project Invitation if applicable, attending an interview if applicable, and for subsequent negotiations, if any, with the Ministries.

6.14 Response Returns

Subject to section 6.10, Responses and accompanying documentation submitted by the Vendors are the property of Alberta Education and will not be returned.

6.15 Vendor Debriefing

Alberta Education will, at the request of an unsuccessful Vendor who responded to this RFQ, conduct a debriefing for the purpose of informing the Vendor as to why their Response was not selected.

6.16 Further Information

For further information, contact:

ShirleyAnn Goski
RFQ Administrator
Contracted and Project Management Services
Strategic Services Division
Alberta Education
19th Floor, Commerce Place
10155-102 Street
Edmonton, Alberta T5J 4L5
Ph: 780-415-2227
Fax: 780-415-6546
E-mail: Contracting.Admin@education.gov.ab.ca

7. RESPONSE PACKAGE

Please provide information as requested below by **clicking within** the grey areas. The grey areas will expand to accommodate your text. To check a box, **double-click** on the box and **choose “checked”** as the default value.

Vendors should check ALL areas of interest, expertise and qualifications.

Name of Vendor/Prime Vendor: _____ Address: _____ _____ _____ Telephone: _____ Fax: _____ E-mail: _____ Legal Name: _____ Name of Signing Authority: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24 For the purposes of this RFQ I am operating as a(n) [check one]: ☐ Individual ☐ Organization ☐ Consortium (complete Attachment) Date submitted to Alberta Education: _____
How did you hear about this Contract opportunity?	
To ensure that we are effectively reaching our Vendor community, we would like a moment of your time. Please indicate how you became aware of this opportunity.	Please select all that apply: ☐ Newspaper <i>Please specify:</i> _____ ☐ Word of Mouth ☐ Alberta Purchasing Connection ☐ Other <i>Please specify:</i> _____
Enclosed is my Response to this Request for Qualifications (RFQ). I consent, and I have obtained written consent of any individuals identified in the Response, to the use of the information in the Response by the Ministries’ employees, contractors and agents. I understand that other government departments that have similar service requirements may also access this information at the sole discretion of the Ministries. Any Contracts offered to me by other government departments as a result of this RFQ will be bound by the terms and conditions of this RFQ. Vendors must accept the terms and conditions of the Request for Qualifications by completing the following statement. I, _____ (sign name), on _____ (date), accept the terms and conditions of this Request for Qualifications.	

Name of Vendor/Prime Vendor: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24
Mandatory Requirements	
1. Do you have experience in one or more the following areas, including the development, implementation and evaluation of processes or tools: ☐ Yes (check any or all that apply) ☐ strategic, business and operational planning Describe: _____ ☐ environmental scanning Describe: _____ ☐ issues management Describe: _____ ☐ knowledge management Describe: _____ ☐ risk management Describe: _____ ☐ public consultation practices Describe: _____ ☐ accountability frameworks Describe: _____ ☐ developing and implementing performance measurement tools Describe: _____ ☐ evaluation of performance measurement tools Describe: _____ ☐ No 2. Do you have experience in accepted research practices in conducting reviews/evaluations? ☐ Yes Describe: _____ ☐ No	

Name of Vendor/Prime Vendor: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24
3. Do you have experience directing project organization? ☐ Yes Describe: _____ ☐ No	
4. Do you have experience in facilitating meetings/events? ☐ Yes Describe: _____ ☐ No	
5. Provide the names of three (3) references using the following format: Reference 1 Name: _____ Contact Information: _____ Job Title: _____ Relationship to Vendor: _____ Reference 2 Name: _____ Contact Information: _____ Job Title: _____ Relationship to Vendor: _____ Reference 3 Name: _____ Contact Information: _____ Job Title: _____ Relationship to Vendor: _____	
6. Do you have experience using the Microsoft Office suite of applications (Word, PowerPoint, Excel, etc) in a Windows environment? ☐ Yes ☐ No	
7. Do you have hardware and software to produce materials that will be used and archived within a Windows environment? ☐ Yes ☐ No	
8. Do you have reliable Internet access and e-mail? ☐ Yes ☐ No	

Name of Vendor/Prime Vendor: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24
Desirable Criteria	
a) Do you have related post-secondary degree from a recognized university? ☐ Yes Describe: _____ ☐ No	
b) Do you have familiarity with Government of Alberta Performance measurement and specifically performance measures of the kindergarten to grade 12 and post-secondary learning system contexts? ☐ Yes Describe: _____ ☐ No	
c) Do you have experience with other comparable educational jurisdictions (other governments, school authorities, governing bodies)? ☐ Yes Describe: _____ ☐ No	
d) Do you have experience in the field of international education? ☐ Yes Describe: _____ ☐ No	
e) Do you have experience in modeling or forecasting trends? ☐ Yes Describe: _____ ☐ No	
f) Do you have experience preparing meeting materials? ☐ Yes Describe: _____ ☐ No	
g) Do you have experience with project management, including performance measurements and providing deliverables on time, within budget and within specifications? ☐ Yes Describe: _____ ☐ No	

Name of Vendor/Prime Vendor: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24																																								
h) Are you fluent in English and French (oral and written)? ☐ Yes ☐ No																																									
i) Do you have oral and/or written fluency in multiple languages? ☐ Yes ☐ No Indicate all languages in which you have oral and/or written fluency: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%;">Language</th> <th style="width: 30%;">Oral Fluency</th> <th style="width: 35%;">Written Fluency</th> </tr> </thead> <tbody> <tr><td>English</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>French</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Blackfoot</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Chinese</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Cree</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>German</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Italian</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Japanese</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Punjabi</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Spanish</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr><td>Ukrainian</td><td style="text-align: center;">☐</td><td style="text-align: center;">☐</td></tr> <tr> <td>Other (specify) _____ _____ _____</td> <td style="text-align: center; vertical-align: middle;"> ☐ ☐ ☐ </td> <td style="text-align: center; vertical-align: middle;"> ☐ ☐ ☐ </td> </tr> </tbody> </table>			Language	Oral Fluency	Written Fluency	English	☐	☐	French	☐	☐	Blackfoot	☐	☐	Chinese	☐	☐	Cree	☐	☐	German	☐	☐	Italian	☐	☐	Japanese	☐	☐	Punjabi	☐	☐	Spanish	☐	☐	Ukrainian	☐	☐	Other (specify) _____ _____ _____	☐ ☐ ☐	☐ ☐ ☐
Language	Oral Fluency	Written Fluency																																							
English	☐	☐																																							
French	☐	☐																																							
Blackfoot	☐	☐																																							
Chinese	☐	☐																																							
Cree	☐	☐																																							
German	☐	☐																																							
Italian	☐	☐																																							
Japanese	☐	☐																																							
Punjabi	☐	☐																																							
Spanish	☐	☐																																							
Ukrainian	☐	☐																																							
Other (specify) _____ _____ _____	☐ ☐ ☐	☐ ☐ ☐																																							
j) Do you have experience working with First Nations, Métis or Inuit communities and/or organizations on related projects? ☐ Yes Describe: _____ ☐ No																																									
k) Do you have knowledge and understanding of First Nations, Métis or Inuit histories, languages, cultures and communities in Alberta? ☐ Yes Describe: _____ ☐ No																																									

Name of Vendor/Prime Vendor: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24
l) Are you willing to attend meetings in Edmonton as required, or participate in teleconference or videoconference meetings upon 48 hours notice? ☐ Yes ☐ No	
m) Are you willing and able to travel to meet project requirements? ☐ Yes ☐ No	

Attachment: Consortium Response

Each member of the Consortium must complete and sign the following form (one form per member). Vendors may copy this Attachment as required.

Name of Vendor: _____ Address: _____ _____ _____ Telephone: _____ Fax: _____ E-mail: _____ Legal Name: _____ Name of Signing Authority: _____	Performance Measurements and Planning Consultative Services RFQ No. AE-05-24
Enclosed is my Response to this Request for Qualifications (RFQ). I consent, and I have obtained written consent of any individuals identified in the Response, to the use of the information in the Response by the Ministries' employees, contractors and agents. I understand that other government departments that have similar service requirements may also access this information. Any Contracts offered to me by other government departments as a result of this RFQ will be bound by the terms and conditions of this RFQ. Vendors must accept the terms and conditions of the Request for Qualifications by completing the following statement. I, _____ (sign name), on _____ (date), accept the terms and conditions of this Request for Qualifications.	