



**CANADA REVENUE AGENCY
TRANSLATION AND EDITING SERVICES PROCUREMENT
FAIRNESS MONITOR FINAL REPORT**

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Submitted To:

Director, Fairness Monitoring
Public Services and Procurement Canada

Submitted By:

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1. Introduction

RFP Solutions Inc. was engaged on May 10, 2018 as a Fairness Monitor (FM) to observe the competitive procurement process associated with the Canada Revenue Agency (CRA) Translation and Editing Services contract. The CRA is retendering this requirement following a decision of the Canadian International Trade Tribunal based on a complaint resulting from the previous procurement.

This document reports the observations of the Fairness Monitor to date with respect to the competitive procurement process for Translation and Editing Services, issued by the CRA as a Request for Proposal (RFP) via Solicitation Number 1000341293 on May 30, 2018 with a closing of July 17, 2018.

RFP Solutions Inc. is an independent third party with respect to this activity.

We hereby submit this Final Report, covering the activities of the Fairness Monitor, commencing with the draft RFP prior to posting on the buyandsell.gc.ca, continuing through the response to enquiries from potential bidders leading to the bid closing period. This report also covers the Fairness Monitor's activities with respect to the evaluation of the bids leading to the identification of the successful bidder.

The report includes our attestation of assurance, a summary of the scope and objectives of our assignment, the methodologies applied and relevant observations from the activities undertaken.

2. Project requirement

The CRA is a federal government agency that is responsible for administering tax, benefit, and related programs. It is also responsible for ensuring tax compliance on behalf of governments across Canada. In this way, the CRA contributes to the economic and social well-being of Canadians.

The CRA has 12 headquarters branches located in the National Capital Region, five regional offices—Atlantic, Quebec, Ontario, Prairie, and Pacific—as well as tax centres and tax services offices across Canada.

The CRA has an ongoing requirement for translation and editing services in Canada's two official languages (English and French) to meet its operational needs.

The objective is to continue providing CRA with the best value of translation and editing services on a national basis while:

- providing one-stop shopping with standardized, high quality translation services delivered on a timely basis;
- streamlining internal business processes and improving overall process efficiencies in the CRA; and
- achieving savings when acquiring translation services.

The objective is to establish a single contract for the services to be performed from date of contract award to October 31, 2020 inclusive with five irrevocable options to extend the contract period. Each option is for an additional period of one year.

3. Attestation of assurance

The Fairness Monitor hereby provides the following unqualified assurance statement concerning the CRA Translation and Editing Service Procurement.

It is our professional opinion that the CRA Translation and Editing Service Procurement process we have observed was carried out in a fair, open and transparent manner.

Steve Johnston
Fairness Monitor Specialist
Managing Director, **RFPSOLUTIONS INC.**

Stephen Fleming, P.Eng.
Fairness Monitor Team Leader

4. Methodology

In accordance with the terms of our engagement, we familiarized ourselves with the relevant documents, reviewed RFP documents prior to release, observed the RFP solicitation activities and the post solicitation period, including the evaluation of bids, identified fairness-related matters to the Contracting Authority and verified that responses and actions were reasonable and appropriate. The following summarizes the specific activities and observations of the FM to date.

5. Fairness Monitor activities and observations

5.1) Procurement planning/pre-issue stage

The Fairness Monitor was engaged to begin FM activities commencing with the development of the RFP. A review of the draft and final RFP documentation was conducted. This included a review of the:

- General Information;
- Bidder Instructions;
- Proposal Preparation Instructions;
- Evaluation and Selection;
- Certifications and Additional Information;
- Security, Financial and Other Requirements, including Mandatory Criteria, Point Rated Criteria and Financial Proposal; and
- Model Contract.

The Fairness Monitor provided assurance as to the impartiality of the requirements, the objectivity of evaluation criteria and process; and the clarity of the documentation to support understandability by proponents in preparing their proposals, as well as to mitigate the potential for inconsistency or errors in the eventual application of evaluation criteria by the Evaluation Committee.

Observations

In reviewing the RFP documentation, fairness considerations were identified by the Fairness Monitor, discussed with the Contracting Authority and fully addressed prior to the release of the RFP.

5.2) Request for proposal posting

The RFP was issued to potential proponents via buyandsell.gc.ca as Solicitation Number 1000341293 on May 30, 2018; the final closing date was on July 17, 2018 at 2:00 pm Eastern Daylight Time.

A total of 36 questions were received and there were nine revisions to the terms and conditions of the solicitation. The responses to the questions and revisions were provided to all potential proponents by way of six amendments via buyandsell.gc.ca. Each amendment was reviewed by the Fairness Monitor prior to being issued.

Observations

In reviewing the RFP amendments, fairness considerations were identified by the Fairness Monitor, discussed with the Contracting Authority and addressed prior to their release.

5.3) Request for proposal close

The Fairness Monitor reviewed the manner in which the proposal responses to the RFP were received and handled with the Contracting Authority.

Five proposals were received by CRA's Bid Receiving Unit and handled in accordance with the closing requirements and deadline stated in the RFP.

Observations

In reviewing the receipt and handling of the RFP responses, the Fairness Monitor did not observe any fairness issues.

5.4) Evaluation instructions

Prior to bid evaluations, the Fairness Monitor reviewed the evaluation guidelines, including evaluator responsibilities, code of conduct, security, confidentiality and conflict of interest requirements, and evaluation methodology.

The Fairness Monitor provided assurance as to the impartiality of the evaluation methodology.

The Fairness Monitor also participated in an orientation session (July 24, 2018) for the evaluators to support their understanding of the process and their role.

Observations

In reviewing the evaluation methodology and related requirements, the Fairness Monitor did not observe any fairness issues.

5.5) Mandatory requirement evaluation

Following the RFP closing, an assessment of the mandatory requirements was undertaken by the Evaluation Committee of the five bids received. The Evaluation Committee determined, following clarifications with bidders, that only one bidder met the mandatory requirements.

The FM observed the Evaluation Committee's deliberations (September 11 and 12 and October 11, 2018) and reviewed all clarification questions before issuance to the bidders, as well as bidder responses prior to release to the Committee.

Observation

In observing the evaluation of the Mandatory Requirements as set out in the RFP, the Fairness Monitor did not identify any fairness issues.

5.6) Technical evaluation

Following review of the mandatory requirements, the compliant bid was evaluated against the technical point rated requirements.

The RFP required an overall minimum rated technical evaluation threshold to be deemed a responsive proposal and proceed to the financial evaluation. The sole compliant bid met the 80% threshold required to pass the technical evaluation. The Fairness Monitor was present and observed the consensus evaluation.

Observation

In observing the Technical consensus evaluation and reviewing the results, the Fairness Monitor did not identify any fairness issues.

5.7) Price evaluation, verification and bidder selection

In accordance with the RFP, the financial proposal for the responsive proposal was opened. The Contracting Authority conducted due diligence on the pricing to ensure that it was fair and aligned with market conditions.

The Fairness Monitor reviewed the results with the Contracting Authority.

The selection of the successful bidder was the sole responsive proposal.

Observation

In reviewing the results of the price evaluation, verification and bidder selection, the Fairness Monitor did not observe any fairness concerns.

5.8) Communications and debriefing

This section will be completed as an addendum to this report following completion of contract award and, as requested, debriefing of bidders.

6. Reference documents

The following documents related to Solicitation Number 1000341293 are available on buyandsell.gc.ca and/or through the project office.

Reference Documents		
#	Document	Document and Issue Date
1	Request for Proposal - Translation and Editing services (1000341293)	May 30, 2018
2	Solicitation Amendment #1 - - Translation and Editing services (1000341293)	June 5, 2018
3	Solicitation Amendment #2 - - Translation and Editing services (1000341293)	June 14, 2018
4	Solicitation Amendment #3 - - Translation and Editing services (1000341293)	June 21, 2018
5	Solicitation Amendment #4 - - Translation and Editing services (1000341293)	June 25, 2018
6	Solicitation Amendment #5 - - Translation and Editing services (1000341293)	June 29, 2018
7	Solicitation Amendment #6 - - Translation and Editing services (1000341293)	July 6, 2018