



**Savings | Choice | Service**

## **PLAYGROUND, PLAY STRUCTURES AND RELATED SERVICES**

### **REQUEST FOR SUPPLIER QUALIFICATIONS #2025-492**

<b>Request for Supplier Qualifications Timetable</b>	
<b>Event</b>	<b>Time/Date</b>
OECM's Issue Date of Request for Supplier Qualifications:	September 25, 2025
Proponent's Information and Ontario Tenders Portal Demonstration Session:	2:00 pm on October 1, 2025
Proponent's Deadline to Submit Questions:	5:00 pm on October 3, 2025
OECM's Deadline for Issuing Answers:	October 10, 2025
Proponent's Deadline to Submit Questions Related to Addenda & Question and Answer Documents:	5:00 pm on October 16, 2025
OECM's Deadline for Issuing Final Documents:	October 23, 2025
Proponent's Intent to Submit a Proposal:	October 27, 2025
Closing Date:	2:00:00 pm on October 31, 2025
Anticipated Master Agreement Start Date:	January 2026
All times specified in this timetable are local times in Toronto, Ontario, Canada	

OECM shall not be obligated in any manner to any Proponent whatsoever until a written Master Agreement has been duly executed with a Supplier.

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## PART 1 – INTRODUCTION

This non-binding Request for Supplier Qualifications (“RFSQ”) is an invitation to obtain Proposals from qualified Proponents for Playground, Play Structures (“Products”) and Related Services (“Service”) as described in Part 2 – The Deliverables.

This RFSQ does not require the Proponents to submit pricing. During the Second Stage Selection Process (“Second Stage”) the Customer will further define their requirements and specifications and request pricing accordingly. Only Suppliers who are awarded Master Agreements resulting from this RFSQ will be eligible to participate in any such Second Stage. The Second Stage, further outlined in Section 1.5.2 provides opportunities for Suppliers who have the capacity and relevant experience.

The Proponent must not be a United States of America Business (“U.S. Business”) as defined in Section 1A.1, where U.S. Business means a supplier, manufacturer, or distributor of any business structure (including a sole proprietorship, partnership, corporation, or other business structure) that: (i) has its headquarters or main office located in the U.S., and (ii) has fewer than two-hundred and fifty (250) full-time employees in Canada. If a Proponent is a subsidiary of another corporation, part (i) of the definition above is met if that Proponent is controlled by a corporation that has its headquarters or main office located in the U.S.

This RFSQ is issued by OECM.

### 1.1     **Objective of this RFSQ**

The objective of this RFSQ is to create a list of qualified Suppliers with the capability to provide the Products and Services to OECM Customers; and to select quality Suppliers that:

- (a) Are authorized to sell and warranty the Products and Services in Canada;
- (b) Are able to propose and provide quality Services to meet the needs of the Customer;
- (c) Work in a cooperative manner with Customers, are flexible, and innovative in providing quality Products and Services;
- (d) Incorporate Environmental, Social and Governance (“ESG”) considerations in the provision of Products and Services;
- (e) Provide technology to support Customer’s operating processes; and,
- (f) Reduce the costs associated with obtaining these Products and appropriate Services (e.g., maintenance, warranty).

### 1.2     **Supplier Experience and Qualifications**

The Supplier shall possess appropriate experience, qualifications, and demonstrated knowledge relative to the Deliverables in this RFSQ including, but not limited to:

- (a) Ensuring supply and installation are in full compliance including, but not limited to:
  - i. Canadian Standards Association for Children’s Playspaces and Equipment (“CSA-Z614:20”);
  - ii. *Accessibility for Ontarians with Disabilities Act* (“AODA”);
  - iii. *Occupational Health and Safety Act* (“OHSA”);
  - iv. International Play Equipment Manufacturers Association (“IPEMA”) (or equivalent);
  - v. Ontario Building Code (“OBC”) and any other applicable Ontario regulations; and,
  - vi. Local building codes and municipal bylaws.
- (b) Ensuring Supplier’s technicians and installers shall have up to date training regarding generally accepted standards and practices for the Services (e.g., on the OHSA, *Ontario Safe Schools Act* (“OSSA”), latest

CSA-Z614-20 certification, and local building and municipal bylaws. Any electrical work shall be carried out by licensed electrical contractors; and,

(c) Possessing required licensing by the Original Equipment Manufacturer ("OEM") when installing Products.

#### **1.3 Authorized Reseller**

The Proponent shall be the OEM or an Authorized OEM Reseller of the Deliverables.

The Supplier shall provide the appropriate resources with associated skills, experience and knowledge to fulfill RFSQ requirements.

Where components comprising the Deliverables are not provided directly by the Supplier, the OEM of those components shall be deemed to be a Supplier's Subcontractor and the Supplier shall be responsible for providing those components to the Customer on the terms and conditions of the Contract.

The Supplier's reseller status shall be maintained throughout the Term, with any changes of status to be communicated to OECM within thirty (30) days of such change.

Authorized Reseller means the OEM has authorized the Supplier to market, advertise, sell, distribute, install, warrant and maintain Products/Services directly to Customers on the OEM's behalf as a provider.

Each Proposal and Appendix G – OEM Authorized Reseller Letters shall represent the OEMs specified within Appendix G.

#### **1.4 Project Background**

In 2025, OECM identified the project as a net new procurement due to increasing Customer demand and interest, in particular School Boards, Municipalities, daycares, Colleges and Universities.

##### **1.4.1 Customer Engagement**

The following Customers were engaged with the development of the Deliverables set out in this RFSQ:

- (a) Brock University;
- (b) Hamilton-Wentworth District School Board; and,
- (c) District School Board Ontario North East.

The above Customers are **not**, in any way, committed to participating in the Master Agreement resulting from this RFSQ.

#### **1.5 Award Strategy**

OECM may, through this RFSQ process, enter into Master Agreements with one (1) or more Suppliers to ensure coverage across Ontario for the provision of the Products and Services for OECM Customers to use on an as-and-when required basis.

The Term is intended to be for three (3) years, with an option in favour of OECM to extend the Term on the same terms and conditions for up to two (2) additional years. Performance as set out in Appendix C – Supplier Performance Management Scorecard and, if applicable, Supplier Recognition Program evaluation results will be considered when contemplating a Master Agreement extension.

Master Agreements will not be awarded by a particular geographical area. The Proponent will, however, identify the Ontario County, District, Region, or Single-Tier ("CDRS") locations (refer to Appendix F) where it is able to provide the Products and Services. This information will be shared with Customers, post-award, to support their Second Stage.

While this RFSQ and resulting Master Agreement are primarily intended for use by OECM Customers located in Ontario, OECM encourages the Supplier to extend the Products/Services to eligible Customers across Canada. Any such CSA must be aligned with the same terms and conditions, except for delivery and related logistical arrangements, set out in the Master Agreement. Delivery and related logistical arrangements, along with Rates for Customers located outside of Ontario shall be mutually negotiated and agreed upon between

the Customer and the Supplier when executing a CSA or placing an order after a CSA has been executed. All provisions of the Mater Agreement, however, shall remain in full force and effect for Ontario Customers.

Ontario Customers participating in the Master Agreements will execute a CSA with a Supplier as attached in Appendix A – Form of Master Agreement. Prior to executing a CSA, the Customer may negotiate their unique requirements and further negotiate with the Supplier and mutually agree to additional terms and conditions (e.g., reporting, Rates specific to the Customer's requirements and volumes) ensuring the additional terms and conditions are not in any way inconsistent with the Master Agreement agreed to by OECM and the Supplier.

The Supplier must provide a copy of every CSA to OECM within thirty (30) days of execution.

#### **1.5.1 No Contract until Execution of Written Master Agreement**

This RFSQ process is intended to identify Proponents for the purpose of negotiation of potential Master Agreements. The negotiation process is further described in Part 3 – Evaluation of Proposals, Section 3.5 of this RFSQ.

**No** legal relationship or obligation regarding the procurement of any Products/Services shall be created between the Proponent and OECM by this RFSQ process until the successful completion of negotiation and execution of a written Master Agreement for the provision of the Products/Services has occurred.

The Master Agreement must be fully executed before the provision of any Deliverables commences.

#### **1.5.2 Customer's Usage of Master Agreements**

The establishment and use of the Master Agreement consists of a two (2) part process.

**Part One**, which is managed by OECM, is the creation of the Master Agreement through the issuance of this RFSQ, the evaluation of Proposals submitted in response to it and the negotiation and execution of the Master Agreement.

**Part Two**, the Second Stage is managed by the Customer or by OECM on the Customer's behalf and is focused on the Customer's specific needs. Depending on the Customer's internal policies, and potential dollar value of the Products/Services a Customer may:

- (a) Select a Supplier, obtain Rates and sign a CSA; or,
- (b) Seek Rates and other relevant Product and Service information specific to a Customer's organization (e.g., Request for Services ("RFS"), or Customer's process (e.g., directly or via an online e-tendering platform) from the Supplier for their specific Product and Service requirements (e.g., Playground site assessment and design options, Rates, timelines for Service completion, cancellation notice if program/project funding has been revoked, modified, or not approved, performance/surety bonds). If selected by the Customer, the Supplier shall provide the Products and Services in accordance with the Master Agreement and in the Customer's CSA.

When a Second Stage request is issued, which does not constitute a contract A, contract B situation, it will identify the required Products/Services or it may request the Supplier to propose appropriate Products and Services to fulfill the Customer's requirements and any other applicable information.

The Customer may negotiate unique requirements (e.g., site specific Deliverables, working hours, reporting, Rates, invoicing) with the Supplier and mutually agree to additional terms and conditions ensuring the additional terms and conditions are not in any way inconsistent with the Master Agreement.

The Supplier must respond to a Second Stage request and, at minimum, the response should set out the following:

- (a) Proposed Products and Services;
- (b) Capacity, lead times for Products and Service; and,

(c) Final, net Rates. The Rates should be valid for a period of not less than ninety (90) days, or as requested by the Customer. Limited time offer Rates and/or promotional Rates must be specified by the Supplier, if applicable to the specific Second Stage request.

#### **1.5.3 No Guarantee of Volume of Work or Exclusivity of Master Agreement**

The volume information contained in this RFSQ constitutes an estimate and is supplied solely as a guideline to the Proponent. Such information is not guaranteed, represented, or warranted to be accurate, nor is it necessarily comprehensive or exhaustive.

Nothing in this RFSQ is intended to relieve the Proponent from forming its own opinions and conclusions with respect to the matters addressed in this RFSQ. Volumes are an estimate only and may not be relied on by the Proponent.

OECM makes no guarantee of the value or volume of work to be assigned to the Supplier.

The Master Agreement executed with the Supplier may not be an exclusive Master Agreement for the provision of the Deliverables. Customers may contract with others for the same or similar Deliverables to those described in this RFSQ.

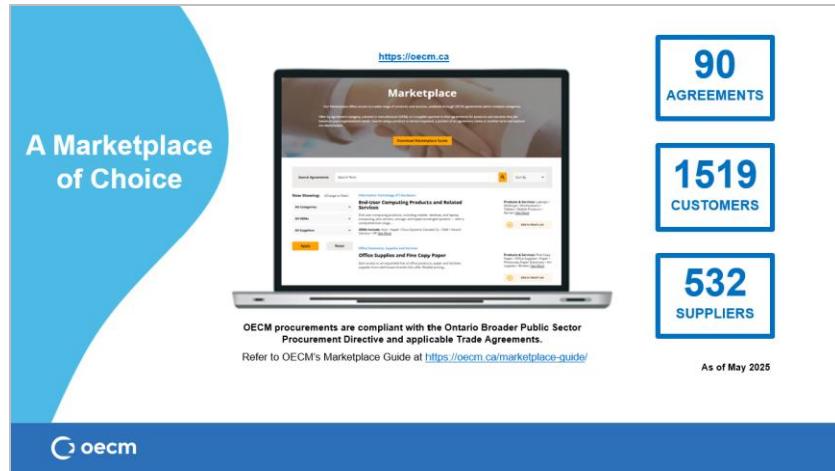
#### **1.6 About OECM**

OECM is a trusted not-for-profit partner for Ontario's educational entities (e.g., school boards or authorities, Provincial and Demonstration Schools Branch with the Ontario Ministry of Education, colleges, and universities, and may also include Private Schools and Private Career Colleges), health and social service entities, hydro, Local Housing Corporations, the Legislative Assembly, Municipalities and related service organizations, not-for-profit organizations, Ontario Electricity Financial Corporation, Ontario Power Authority, provincially funded organizations ("PFO"), shared service organizations, utilities and local boards, and any other Ontario Broader Public Sector ("BPS") agency, Ontario Public Service ("OPS") ministry, agency, board or commission, Crown corporations, First Nations federal agencies, Indigenous Businesses and Communities, and other provincial, territorial and federal public sector entities/agencies or similar entities not mentioned here.

OECM contracts with innovative, reputable Suppliers to offer a comprehensive choice of collaboratively sourced and competitively priced products and services through its Marketplace, the goal of which is to generate significant value and savings, quality of choice and consistent service for its Customers. In addition to the Marketplace, OECM offers contract management services, procurement advisory services, business analytics, and opportunities for knowledge sharing.

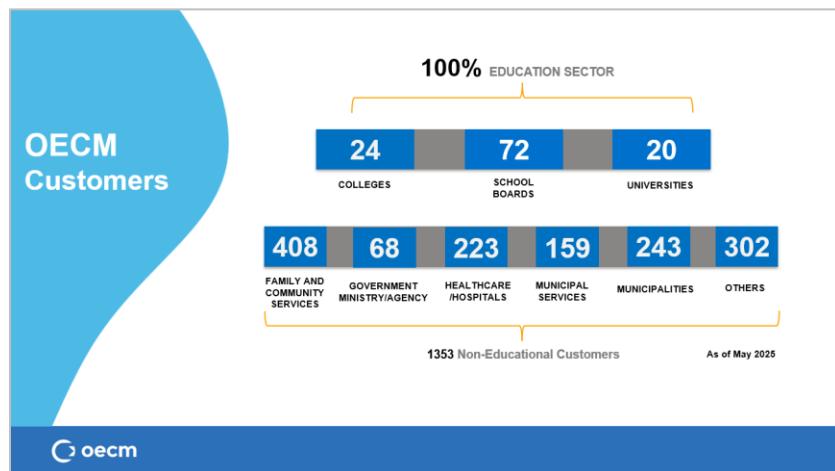
Recognizing the power of collaboration, OECM is committed to fostering strong relationships with both Customers and suppliers by:

- (a) Actively sourcing products and services in an open, fair, transparent and competitive manner, compliant with BPS Procurement Directive and applicable trade agreements;
- (b) Establishing, promoting and managing product and service agreements used throughout its Customer community;
- (c) Supporting Customers' access and use of OECM agreements through analysis, reporting and the development of tools, guides, and other materials;
- (d) Effectively managing supplier contract performance while harnessing expertise and innovative ideas, to drive continuous improvements through a Supplier Relationship Management program;
- (e) Promoting OECM's Supplier Code of Conduct, based on its core values of collaboration, responsiveness, integrity, innovation, and respect, to ensure that all supplier partners adhere to a set standard when conducting business with OECM and its Customers resulting in continuous, long-term success; and,
- (f) Supporting supplier partners through a Supplier Recognition Program that aims to drive long-term performance by recognizing and motivating Suppliers to deliver continued savings, value, choice, and service to Customers.



### 1.6.1 Use of OECM Master Agreements

As of March 2025, one thousand, five hundred and nineteen (1,519) Customers were using one (1) or more OECM agreements with a cumulative spend of more than five (5) billion dollars over the last ten (10) years.



More information about OECM is available on our website - <https://www.oecm.ca>.

### 1.6.2 Customer Geographical Locations

OECM Customers, in Ontario, are located in the CDRS locations, refer to Appendix F.



Also refer to Appendix E – OEM School Board, College and University Customers in Ontario illustrating OEM's educational Customers by Zone.

### 1.6.3 The Ontario Broader Public Sector Procurement Directive

OECM, and the BPS Customers they service, follow the Ontario BPS Procurement Directive. The Directive sets out rules for designated BPS entities on the purchase of goods and services using public funds.

The Procurement Directive is available [here](#)

[Broader Public Sector Procurement Directive \(ontario.ca\)](http://www.ontario.ca)

#### 1.6.4 Trade Agreements

OECM procurements are undertaken within the scope of Chapter 5 of the Canadian Free Trade Agreement ("CFTA"), Chapter 19 of the Comprehensive Economic and Trade Agreement ("CETA"), and within the scope of the Trade and Cooperation Agreement between Quebec and Ontario and are subject to such agreements, although the rights and obligations of the parties shall be governed by the specific terms of this RFSQ. For more information, refer to the Section 4.6.12.

[End of Part 1]

## PART 1A – RULES OF INTERPRETATION AND DEFINITIONS

### 1A.1 Rules of Interpretation

This RFSQ shall be interpreted according to the following provisions, unless the context requires a different meaning:

- (a) Unless the context otherwise requires, wherever used herein the plural includes the singular, the singular includes the plural, and each of the masculine and feminine includes the other gender;
- (b) Words in the RFSQ shall bear their natural meaning;
- (c) References containing terms such as “includes” and “including”, whether or not used with the words “without limitation” or “but not limited to”, shall not be deemed limited by the specific enumeration of items but shall, in all cases, be deemed to be without limitation and construed and interpreted to mean “includes without limitation” and “including without limitation”;
- (d) In construing the RFSQ, general words introduced or followed by the word “other” or “including” or “in particular” shall not be given a restrictive meaning because they are followed or preceded (as the case may be) by particular examples intended to fall within the meaning of the general words;
- (e) Unless otherwise indicated, time periods will be strictly applied; and,
- (f) The following terminology applies in the RFSQ:
  - i. The terms “must” and “shall” relate to a requirement the Supplier will be obligated to fulfil. Whenever the terms “must” or “shall” are used in relation to OEMC or the Supplier, such terms shall be construed and interpreted as synonymous and shall be construed to read “OEMC shall” or the “Supplier shall”, as the case may be;
  - ii. The term “should” relates to a requirement that OEMC would like the Supplier to fulfil; and,
  - iii. The term “will” describes a procedure that is intended to be followed.

### 1A.2 Definitions

Unless otherwise specified in this RFSQ, capitalized words and phrases have the meaning set out in Appendix A – Form of Master Agreement attached to this RFSQ.

**“Applicable Law”** means any common law requirement and all applicable and enforceable statutes, regulations, directives, policies, administrative interpretations, orders, by-laws, rules, guidelines, approvals and other legal requirements of any government and/or regulatory authority in effect from time to time;

**“Authorized Reseller”** means a Person that is authorized by the OEM to market, advertise, sell, distribute, install, warrant and maintain the Products/Services;

**“Broader Public Sector” or “BPS” means:**

- (a) every hospital (i.e., public hospital, private hospital that received public funds in the previous fiscal year of the Government of Ontario, a community health facility within the meaning of the *Oversight of Health Facilities and Devices Act* that was formerly licensed under the *Private Hospitals Act* and that received public funds in the previous fiscal year of the Government of Ontario, and the University of Ottawa Heart Institute);
- (b) every school board;
- (c) every university in Ontario;
- (d) every college of applied arts and technology and post-secondary institution;
- (e) every agency designated as a children’s aid society under subsection 34 (1) of Part III of the *Child, Youth and Family Services Act, 2017*;

- (f) every corporation controlled by one (1) or more designated Broader Public Sector organizations that exists solely or primarily for the purpose of purchasing goods or services for the designated Broader Public Sector organizations;
- (g) every publicly funded organization that received public funds of 10 million dollars or more in the previous fiscal year of the Government of Ontario; and,
- (h) every organization that is prescribed for the purposes of this definition;

See <https://www.ontario.ca/page/broader-public-sector-accountability>;

See <https://www.ontario.ca/page/find-school-board-or-school-authority>; and,

See <https://www.ontario.ca/page/go-college-or-university-ontario>;

**“Business Day”** means Monday to Friday between the hours of 9:00 a.m. to 5:00 p.m. for OECM, as specified in the Customer’s CSA, or agreed to by the parties in writing, except when such a day is a public holiday, as defined in the *Employment Standards Act* (Ontario);

**“Closing Date”** means the Proposal submission date and time as set out in OTP and in Section 4.1.1 and may be amended from time to time in accordance with the terms of this RFSQ;

**“Confidential Information”** means confidential information of OECM and/or any Customer (other than confidential information which is disclosed to the Preferred Proponent in the normal course of the RFSQ) where the confidential information is relevant to the Deliverables required by the RFSQ, its pricing or the RFSQ evaluation process, and includes all information concerning the business or affairs of the party or its directors, governors, trustees, officers or employees that is of a confidential nature, which information if in written or other tangible form, is clearly designated as confidential, or if disclosed orally, is designated as confidential in a written memorandum delivered by the disclosing party promptly following such disclosure. For the purposes of greater certainty, Confidential Information shall:

- (a) Include:(i) all new information derived at any time from any such Confidential Information whether created by OECM, the Customer, the Proponent or any third-party; (ii) all information (including Personal Information) that OECM or the Customer is obliged, or has the discretion, not to disclose under provincial or federal legislation; and, (iii) pricing under this RFSQ;
- (b) not include information that: (i) is or becomes generally available to the public without fault or breach on the part of the disclosing party of any duty of confidentiality owed by it hereunder; (ii) the disclosing party can demonstrate to have been rightfully obtained it, without any obligation of confidence, from a third-party who had the right to transfer or disclose it to the disclosing party free of any obligation of confidence; (iii) the disclosing party can demonstrate to have been rightfully known to or in the possession of it at the time of disclosure, free of any obligation of confidence when disclosed; or (iv) is independently developed by the disclosing party; but the exclusions in this subparagraph shall in no way limit the meaning of Personal Information or the obligations attaching thereto under the Contract or at law;

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

- (a) in relation to the RFSQ 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 OECM and not available to other respondents; (ii) communicating with any person with a view to influencing preferred treatment in the RFSQ process; or (iii) engaging in conduct that compromises or could reasonably be seen to compromise the integrity of the open and competitive RFSQ process and render that process non-competitive and unfair; or,
- (b) in relation to the performance of its contractual obligations in an OECM contract, the Proponent’s other commitments, relationships or financial interests (i) could or could reasonably be seen to exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement; or (ii) could or could reasonably be seen to compromise, impair or be incompatible with the effective performance of its contractual obligations;

**“Consortium”** means when more than one (1) business entities (i.e., Consortium members) agree to work together and submit one (1) Proposal to satisfy the requirements of the RFSQ. One (1) of the Consortium

members shall identify itself as the Proponent and assume full responsibility and liability for the work and actions of all Consortium members;

**“Cost Recovery Fee”** or **“CRF”** means a fee, which contributes to the recovery of OECM’s operating costs as a not-for-profit/non share capital corporation, which is based on the before tax amount invoiced by the Supplier to Customers for Deliverables acquired through OECM’s competitively sourced agreements. Once Customer-Supplier Agreements have been executed, this fee is remitted by the Supplier to OECM on a quarterly basis;

**“Customer”** means an organization such as educational entities (e.g., school boards or authorities, Provincial and Demonstration Schools Branch with the Ontario Ministry of Education, colleges, and universities, and may also include Private Schools and Private Career Colleges), health and social service entities, hydro, Local Housing Corporations, the Legislative Assembly, Municipalities and related service organizations, not-for-profit organizations, Ontario Electricity Financial Corporation, Ontario Power Authority, provincially funded organizations (“PFO”), shared service organizations, utilities and local boards, and any other Ontario Broader Public Sector (“BPS”) agency, Ontario Public Service (“OPS”) ministry, agency, board or commission, Crown corporations, First Nations federal agencies, Indigenous Businesses and Communities, and other provincial, territorial and federal public sector entities/agencies or similar entities not mentioned here;

**“Customer-Supplier Agreement”** or **“CSA”** means a schedule attached to the Master Agreement, which is executed between Customers and a Supplier for the provision of any Deliverables in this RFSQ specific to their organization;

**“Deliverable”** means all Products/Services to be provided or performed by the Supplier, under the Master Agreement, and includes everything that is necessary to be supplied, provided or delivered by the Supplier within scope of the resulting Master Agreement;

**“Eligible Proposal”** means a Proposal that meets or exceeds the prescribed requirement, proceeding to the next stage of evaluation;

**“Indigenous Business”** means a sole proprietorship, limited company, co-operative, partnership, joint venture and not-for-profit organization that (i) has at least fifty-one percent (51%) owned and controlled by Indigenous Peoples, (ii) as a joint venture, it must have at least fifty-one percent (51%) owned and controlled by Indigenous Peoples, and (iii) for an organization or joint venture to qualify as an Indigenous Business, it must demonstrate that at least twenty-five percent (25%) of the value of the work performed under the resulting Master Agreement will be performed by Indigenous Business;

**“Indigenous Peoples”** means individuals who are recognized First Nations, Metis, Inuit or Native American;

**“Local Housing Corporation”** means a local housing corporation as defined in the *Housing Services Act, 2011*, S.O. 2011, c. 6, Sched. 1;

**“Master Agreement”** means the agreement to be made between the Preferred Proponent and OECM based on the template attached as Appendix A – Form of Master Agreement with negotiated changes, together with all schedules and appendices attached thereto and all other documents incorporated by reference therein, as amended from time to time by agreement between OECM and the Supplier;

**“Municipalities”** means municipal entities established under applicable provincial or territorial legislation across Canada. This includes, but is not limited to, cities, towns, villages, rural municipalities, counties, districts, regional municipalities, local service districts, and local boards or commissions empowered by municipal statutes. This definition also includes affiliated agencies, boards, and commissions that operate under or in collaboration with these municipal entities. For clarity, this definition encompasses municipalities as defined under:

- (a) *Municipal Act, 2001 (Ontario)* and *City of Toronto Act (Ontario)*;
- (b) *Municipal Government Act* (Alberta, Nova Scotia, Prince Edward Island);
- (c) *Community Charter and Local Government Act* (British Columbia);
- (d) *Cities Act and Municipalities Act* (Saskatchewan);
- (e) *Municipal Act* (Manitoba, New Brunswick, Newfoundland and Labrador);

(f) *Cities, Towns and Villages Act* (applicable in the Northwest Territories and Nunavut); and,

(g) *Municipal Act* (Yukon), and others;

**“OECM”** means the Ontario Education Collaborative Marketplace;

**“OECM’s Deadline for Issuing Final Addenda”** means the date and time as set out in Section 4.1.1 of this RFSQ and may be amended from time to time in accordance with the terms of this RFSQ;

**“Ontario Public Service”** or **“OPS”** means Ontario Public Service entities, the ministries and other administrative units of Ontario over which ministers of Ontario preside (including their agencies, boards, commissions, and Crown corporations);

**“Ontario Tenders Portal”** or **“OTP”** means the electronic tendering platform <https://ontariotenders.app.jaggaer.com/esop/nac-host/public/web/login.html> through which a Proponent’s Proposal must be submitted by the Closing Date;

**“Personal Information”** has the same definition as in subsection 2(1) of FIPPA and in subsection 2(1) of MFIPPA, that is, recorded information about an identifiable individual or that may identify an individual and includes all such information obtained by the Proponent from OECM or the Customer or created by the Proponent pursuant to the RFSQ

**“PFO”** means a provincially funded organization;

**“Preferred Proponent”** means the Proponent that is invited into negotiations in accordance with the evaluation process set out in this RFSQ;

**“Product”** means all Product Deliverables to be provided or performed by the Supplier, under the Master Agreement, and includes everything that is necessary to be supplied, provided or delivered by the Supplier;

**“Proponent”** means an entity that submits a Proposal in response to this RFSQ and, as the context suggest, refers to a potential Proponent;

**“Proposal”** means all documentation and information submitted by a Proponent in response to the RFSQ;

**“Purchasing Card”** or **“P-Card”** means the corporate charge cards used by the Customer, as may be changed from time to time;

**“Qualification Envelope”** means an area in OTP where the Proponent would complete its Qualification Response;

**“Qualification Response”** means the information the Proponent is required to submit within OTP as part of the Qualification Envelope;

**“Rates”** means the maximum prices, in Canadian funds, for the Products and Services as mutually agreed upon between the Customer and Supplier;

**“Request for Supplier Qualifications”** or **“RFSQ”** means this Request for Supplier Qualifications #2025-492 issued by OECM, including all appendices and addenda thereto;

**“Second Stage Selection Process”** or **“Second Stage”** means a request from one (1) or more Suppliers via a Second Stage tool (e.g., Request for Service (“RFS”), or Customer’s process (e.g., directly or via an online e-tendering platform)) from a Customer or from OECM on behalf of a Customer, seeking Rates and relevant Products specific to a Customer’s organization;

**“Services”** means all Service Deliverables to be provided or performed by the Supplier, under the Master Agreement, and includes everything that is necessary to be supplied, provided or delivered by the Supplier;

**“Subcontractor”** includes the Supplier’s subcontractors or third-party providers or their respective directors, officers, agents, employees or independent contractors, who shall fall within the meaning of Supplier for the purposes of the Master Agreement as mutually agreed upon by the Customer;

**“Supplier”** means a Preferred Proponent who has fully executed a Master Agreement with OECM and has assumed full liability and responsibility for the provision of Deliverables pursuant to the Master Agreement either as a single Supplier or a lead Supplier engaging other suppliers or Subcontractors;

**“Technical Envelope”** means an area in OTP where the Proponent would complete its Technical Response;

**“Technical Response”** means the information, which will be evaluated and scored, the Proponent submits within OTP as part of the Technical Envelope;

**“Term”** has the meaning set out in Section 1.5 of this RFSQ;

**“Unfair Advantage”** means any conduct, direct or indirect, by a Proponent that may result in gaining an unfair advantage over other Proponents, including, but not limited to (i) possessing, or having access to, information in the preparation of its Proposal that is confidential to OECM and which is not available to other Proponents, (ii) communicating with any person with a view to influencing, or being conferred preferred treatment in, the RFSQ process, or (iii) engaging in conduct that compromises or could be seen to compromise the integrity of the RFSQ process and result in any unfairness; and,

**“U.S. Business”** means a supplier, manufacturer, or distributor of any business structure (includes a sole proprietorship, partnership, corporation, or other business structure) that: (i) has its headquarters or main office located in the United States of America (U.S."), and (ii) has fewer than two hundred and fifty (250) full-time employees in Canada prior to the Closing Date. A supplier, manufacturer, or distributor that is a subsidiary of another corporation, part (i) of the definition above is met if that supplier, manufacturer, or distributor is controlled by a corporation that has its headquarters or main office located in the U.S.

[End of Part 1A]

## PART 2 – THE DELIVERABLES

This Part of the RFSQ describes the Playground and Play Structures (“Product”) and Related Service (“Service”) Deliverables which will be incorporated into the final Master Agreement.

OECM requires that the Proponent has a clear and comprehensive understanding of the RFSQ requirements (i.e., Part 2 – The Deliverables). The Proponent will be required to indicate their agreement accordingly in the Form of Offer in the Qualification Envelope on OTP.

The Supplier shall provide all RFSQ Deliverables except for those noted as optional in Section 2.7. The Supplier and its resources shall be licensed and certified to provide the proposed Products and Services (including applicable warranties).

### 2.1 Description of Deliverables

The Supplier shall provide the following Products and Services to meet the needs of Customers, such as:

- (a) Site Assessment, Decommissioning and Preparation Services including, but not limited to assessing site conditions, soil testing, site dismantling, base preparations and locates;
- (b) Project Design Services including, but not limited to renderings, supporting Customer committees and public consultations via presentations, responding to questions and feedback, preparation of permit and other regulatory applications, acquiring Customer site specific approvals, and permits);
- (c) Supply and Installation of Products including, but not limited to site coordination and oversight, delivery, deficiency review and rectification;
- (d) Initial third-party inspection of site(s) and structures;
- (e) Warranty Coverage for Products and Services;
- (f) Ensuring supply and installation are in full compliance including, but not limited to:
  - i. Canadian Standards Association for Children’s Playspaces and Equipment (“CSA-Z614:20”);
  - ii. *Accessibility for Ontarians with Disabilities Act* (“AODA”);
  - iii. *Occupational Health and Safety Act* (“OHSA”);
  - iv. International Play Equipment Manufacturers Association (“IPEMA”) (or equivalent);
  - v. Ontario Building Code (“OBC”) and any other applicable Ontario regulations; and,
  - vi. Local building codes and municipal bylaws.
- (g) Appropriate surety and bonding documentation (i.e., performance and labour and materials bond, digital bond), if required by the Customer;
- (h) Ensuring technicians and installers shall have up to date training regarding generally accepted standards and practices for the Services (e.g., on the OHSA, *Ontario Safe Schools Act* (“OSSA”)), latest CSA-Z614-20 certification, and local building and municipal bylaws. Any electrical work shall be carried out by licensed electrical contractors;
  - (i) Provide a copy of training certifications and confirmations if requested by the Customer;
  - (j) When installing Products, must be licensed by the Original Equipment Manufacturer (“OEM”) of the Products; and,
- (k) The initial third-party inspection Services of sites shall be carried out by a Canadian Certified Playground Inspector.

The Supplier shall provide all professional technicians, equipment, labour, and materials necessary for the provision of all Services.

The Supplier shall ensure Products and Services follow the Provincial and the Customer's applicable Health and Safety procedures and other policies and procedures of the Customer.

The Supplier shall ensure compliance with all other Applicable Laws and Standards having jurisdiction for delivering of the Products and Services.

## **2.2 Site Assessment, Decommissioning, and Preparation Services**

The Supplier shall provide Site Assessment, Decommissioning, and Preparation Services including, but not limited to:

### **2.2.1 Site Assessment Services**

The Supplier shall provide Site Assessment Services including, but not limited to:

- (a) Assessing existing site conditions including surveying terrain, environmental sensitivities (e.g., tree protection, water bodies) drainage, vegetation, underground utilities and infrastructure, and surrounding land use;
- (b) Identifying and marking underground services including contacting local utility for locate confirmation;
- (c) Testing soil conditions for stability, subgrade evaluation and contamination (if required by the Customer, municipality or site history) for suitability and compaction; and,
- (d) Providing an assessment report with photographic documentation and recommendations.

### **2.2.2 Decommissioning Services**

The Supplier shall provide a full-service Decommissioning Services, including an Environmental Plan to evaluate and maximize environmental protection and Green House Gases ("GHG") reductions as it relates to the materials being removed.

The Supplier shall provide Decommissioning Services including, but not limited to:

- (a) Securing work zones with proper fencing and signage per OHSA and municipal standards;
- (b) Safely dismantling of all existing play equipment and surfacing including proper destruction and disposal as noted by the Customer;
- (c) Using proper segregation and disposal/recycling of materials (e.g., steel, plastics, wood);
- (d) Providing remediation of hazardous materials if found (e.g., treated wood, lead-based components);
- (e) Backfilling and grading of excavation sites; and,
- (f) Confirming utility disconnections, if applicable.

### **2.2.3 Preparation Services**

The Supplier shall provide site Preparation Services including, but not limited to:

- (a) Excavation to required depth for new surfacing system (e.g., engineered wood fiber, poured-in-place rubber);
- (b) Installing base materials per manufacturer and CSA Z614:20 guidelines;
- (c) Addressing site drainage and slope, ensuring proper runoff and erosion control;

- (d) Installing concrete or other necessary foundations and footings, per playground manufacturer specifications, including local frost and soil conditions. Foundations are not to be buried until approved by the Customer its representative through visual inspection;
- (e) Coordinating utility locates and relevant municipal departments;
- (f) Ensuring site access for installation equipment and personnel;
- (g) Providing waste disposal and recycling certificates; and,
- (h) Providing inspection reports for subsurface preparation, including acceptable surfacing containment with appropriate materials for specified surface materials and ensuring containment perimeter drainpipe is daylighted to a suitable location as approved by Customer to maintain proper drainage.

## **2.3 Project Design Services**

The Supplier shall provide Project Design Services including, but are not limited to:

### **2.3.1 Conceptual, Detailed Design Development and Rendering Services**

The Supplier shall provide Conceptual, Detailed Design Development and Renderings Services including, but not limited to:

- (a) Developing multiple preliminary concepts for review based on client input and site conditions;
- (b) Finalizing designs including playground equipment layout, surfacing, accessibility features, shade structures, and landscaping integration;
- (c) Providing 2D and 3D layout plans and photo realistic renderings;
- (d) Presenting alternate colour schemes and design options;
- (e) Incorporating multi-sensory play elements: auditory, tactile, vestibular, and proprioceptive;
- (f) Providing ground-level components must be on accessible surfacing and include for elevated components; and,
- (g) Encouraging social and parallel play designs.

### **2.3.2 Customer Committee and Stakeholder Support Services**

The Supplier shall provide support Services to Customers including, but not limited to:

- (a) Attending online or in person meetings, including review of the technical meeting minutes, as required;
- (b) Delivering formal presentations to municipal staff, parent councils, school boards, or other relevant community representatives;
- (c) Responding in writing or via meetings to questions and comments regarding safety, design, materials, warranties, and maintenance; and,
- (d) Assisting with visual boards or interactive sessions for public input, if part of the Customer process.

### **2.3.3 Site Specific Approvals and Permits Support Services**

The Supplier shall provide Site Specific Approvals and Permit Support Services including, but not limited to:

- (a) Preparing and submitting all required applications for site-specific permits and approvals that may include zoning clearances, development permits, tree removal permits, and building permits, where applicable;

- (b) Liaising with municipal planning, parks, and building departments as needed;
- (c) Addressing comments and revise plans accordingly; and,
- (d) Providing site plans, structural details, and Product certifications required for approvals and securing those approvals.

## **2.4 Supply and Installation Services**

The Supplier shall provide Supply and Installation Services including, but are not limited to:

### **2.4.1 Site Coordination and Oversight Services**

The Supplier shall provide Site Coordination and Oversight Services including, but not limited to:

- (a) Conducting site visits for pre-installation assessments (e.g., grading, access, utilities);
- (b) Coordinating with municipal staff, regulatory officials and third-party contractors and sub-trades;
- (c) Providing detailed shop drawings, site plans, and installation schedules;
- (d) Maintaining daily logs and project progress reports;
- (e) Ensuring traffic and pedestrian safety during construction; and,
- (f) Maintaining dust and noise control as per municipal regulations.

### **2.4.2 Delivery and Installation Services**

The Supplier shall provide Delivery and Installation Services including, but are not limited to:

- (a) Delivering materials in a timely and organized manner;
- (b) Providing secure on-site storage, if required;
- (c) Ensuring all installation work to be completed by certified installers; and,
- (d) Ensuring alignment with seasonal construction schedules to avoid freeze and thaw issues.

### **2.4.3 Deficiency Review and Rectification Services**

The Supplier shall provide Deficiency Review and Rectification Services including, but are not limited to:

- (a) Conducting post-installation inspection(s) with the Customer and/or third-party inspection agent, authorized personnel or Customer's own designated provider, as mutually agreed to by both parties;
- (b) Providing a deficiency report with timeline for correction;
- (c) Rectifying all deficiencies prior to official project handover; and,
- (d) Providing CSA Z614 compliance certificate and safety audit report.

### **2.4.4 Documentation and Training Services**

The Supplier shall provide Document and Training Services including, but not limited to:

- (a) Submitting as-built drawings, equipment manuals, and maintenance schedules;
- (b) Providing training session for maintenance staff; and,
- (c) Suppling a warranty package outlining manufacturer and installer coverage as part of project handover.

## **2.5 Initial Third-Party Inspection Services for Playground Sites and Play Structures**

The Supplier shall arrange and provide Initial, Third-Party Inspection Services for Playground Sites, Play Structures including, but are not limited to:

### **2.5.1 Site Inspection Services**

The Supplier shall provide Site Inspection Services including, but not limited to:

- (a) Performing initial inspections of all designated Playgrounds, Play Structures and associated structural features, along with site (surface) inspections. The initial inspection is to be carried out within one (1) year from date of acceptance by the Customer; and,
- (b) Identifying risk hazards including, but not limited to defects, protrusions and entanglements, fall hazards, worn, broken, or improperly installed components, improper surfacing or drainage.

### **2.5.2 Documentation and Reporting Services**

The Supplier shall provide Documentation and Reporting Services including, but not limited to:

- (a) Initial inspections of all designated Playgrounds, Play Structures and associated structural features, along with site (surface) inspections;
- (b) Findings, compliance status, and required corrective actions;
- (c) Timeframe recommendations for repairs or replacements; and,
- (d) Annotated photos.

## **2.6 Playground and Play Structure Products**

The Supplier shall provide Playground and Play Structure Products including, but are not limited to:

### **2.6.1 Playground and Play Structures**

The Supplier shall provide the following Products including, but not limited to:

- (a) Slides (various heights);
- (b) Climbers (rock walls, rope climbers, ladders);
- (c) Swings (belt, bucket, inclusive swings);
- (d) Soccer, basketball nets and other sport accessories requiring replacement through wear and tear;
- (e) Bridges, tunnels, ramps, balance beams;
- (f) Canopies, roof shelters;
- (g) Ropes, rubber tires, climbing chain nets;
- (h) Interactive, sensory, and tactical panels (e.g., tic-tac-toe, maze panels, textured panels); and,
- (i) Equipment and layout must address the developmental needs of the following age groups:
  - i. Preschool (2 – 5 years);
  - ii. School Age (5 – 12 years); and,
  - iii. Each cohort must have age-appropriate zones clearly defined and separated for safety.

## **2.7 Optional Products**

The Supplier should provide the other Products if required by the Customer including, but not limited to the supply, and installation of splashpads, skateboard structures and targeted fitness structures.

## **2.8 Warranty Coverage Products and Services**

The Supplier shall warrant purchased Products and Services provided at Customer's location for a minimum of, but not limited to the following conditions:

- (a) The warranty on the protective play space surface shall be a minimum of two (2) years from the date of completion and acceptance by the Customer;
- (b) All workmanship and material Services shall be guaranteed for a period of two (2) years, from the date of substantial performance certificate of the project and all work must be performed to the satisfaction of the Customer; and,
- (c) The warranty on the Product frame and all major structural components shall be a minimum of twenty (20) years and non-structural components shall be a minimum of ten (10) years from the date of completion and acceptance by the Customer.

The Supplier shall ensure the OEM warrants that its warranty period is for a minimum of twenty (20) years for all Product frame and major structural components and non-structural Product components shall possess a warranty of a minimum of ten (10) years from the date of completion and acceptance by the Customer.

## **2.9 Performance Security**

The Supplier shall, if required by the Customer and as required by the *Construction Act* and all Applicable Law, provide a performance bond to the Customer in order to guarantee satisfactory completion of the Services.

The terms, conditions, and responsibility for costs of the performance/surety bond shall be mutually agreed upon between the Supplier and the Customer. Performance bonds may range in the amount from fifty percent (50%) to one hundred percent (100%) of the value of the Services.

## **2.10 Electrical Requirements**

The Supplier shall ensure electrical products are authorized or approved by the Customer and in accordance with the Ontario Electrical Safety Code, the Canadian Standards Association Group ("CSA Group"), Underwriters Laboratories of Canada ("ULC"), a certification organization accredited with the *Standards Council of Canada Act* (Canada), and shall bear the certification organization's mark identifying the goods certified for use in Canada. Certification shall be to the standard that is appropriate for the intended use of the electrical products at Customer's facilities.

## **2.11 Workplace Hazardous Material Information System**

The Supplier shall ensure Workplace Hazardous Materials Information System ("WHMIS") Safety Data Sheets ("SDS") are onsite as required. Additionally, the Supplier should provide the Customer's personnel WHMIS training, as it relates to the products and equipment, in accordance with the *Ontario Occupational Health and Safety Act*.

## **2.12 Disaster Recovery and Business Continuity**

The Supplier shall possess and provide to OEM and/or Customers upon request, information about disaster recovery and business continuity programs including processes, policies, and procedures related to safety standards, preparing for recovery or continuation of Product/Service availability critical to Customers.

## **2.13 Licences, Permits, Right to Use and Approvals**

The Supplier shall obtain all licences, permits, right to use and approvals required in connection with the supply of the Products and Services and provide them at Customer and OEM request. The costs of obtaining such licences, permits, right to use and approvals shall be the responsibility of, and shall be paid for by, the Supplier.

Where a Supplier is required by Applicable Law to hold or obtain any such licence, permit, right to use and approval to carry on an activity contemplated in its Proposal or in the Master Agreement, neither acceptance of the Proposal nor execution of the Master Agreement by OECM shall be considered an approval by OECM for the Supplier to carry on such activity without the requisite licence, right to use or approval.

## **2.14 Environmental, Social, and Governance**

The Supplier shall possess and provide information, if requested by OECM or the Customer, related to its robust ESG business framework.

The Supplier shall collaborate and support the Customer to align with their ESG framework as it relates to currently available ESG processes, products/equipment, technologies and/or sustainable initiatives.

Wherever practical and without compromising quality, Suppliers are to promote:

- (a) Environmental design principles as required by the Customer (e.g., environmental sustainability, data security and privacy, lean construction practices, waste management, decarbonization, indoor air quality, comfort);
- (b) Sustainable social design principles as required by the Customer (e.g., social equity and equality, diversity, inclusive, accessibility, economic, and cultural impacts that achieve overarching Customer goals that helps shape healthy, diverse and inclusive environments); and,
- (c) Governance practices to enhance positive impact to the Customer (e.g., corporate oversight, risk management, staff retention and management, and leadership).

The Supplier should keep OECM and Customers informed about social procurement processes.

Throughout the Term of the Master Agreement, OECM and/or the Customer may consult with the Supplier to assess ESG commitments.

## **2.15 Financial Administration Act Section 28**

In accordance with the requirements of the *Financial Administration Act* (“FAA”), notwithstanding anything else in the CSA, or in any other agreement between the Customer and the Supplier executed to carry out the Products/Services provided for herein, the remedies, recourse or rights of the Supplier shall be limited to the Customer and to the right, title and interest owned by the Customer in and to all of its real or personal property, whether now existing or hereinafter arising or acquired from time to time. The Supplier unconditionally and irrevocably waives and releases all other claims, remedies, recourse or rights against the Crown in right of Ontario in respect of the CSA, and agrees that it shall have no remedies, recourse or rights in respect of the CSA against the Crown in right of Ontario, any Ontario Ministry, Minister, agent, agency, servant, employee or representative of the Crown or any director, officer, servant, agent, employee or representative of a Crown agency or a corporation in which the Crown holds a majority of the shares or appoints a majority of the directors or members, other than against the Customer and its assets.

If the Supplier and the Customer agree that a CSA is exempt from the application of subsection 28(1) of the *Financial Administration Act* pursuant to Ontario Regulation 376/18: Section 28 Exemptions – Colleges, the Customer represents and warrants that the CSA (i) complies with all applicable policies of the Customer; (ii) complies with all applicable laws and Ontario government directives applicable to it; and, (iii) relates to activities of the Customer that are permitted under its objects and that are undertaken within Canada. The Supplier represents and warrants that the CSA complies with all Applicable Laws and Ontario government directives applicable to it.

## **2.16 Order Management**

The Supplier shall provide a variety of ways for Customers to order Products/Services including, but not limited to:

- (a) Electronic Data Interchange (“EDI”);
- (b) Email;
- (c) Fax;

- (d) Supplier's online ordering process.
- (e) Toll free phone; and/or,
- (f) Via purchase order through the Customer's system;

Where applicable, Customers may need to perform integration testing on the Supplier's online ordering system to ensure it is compatible with the Customers' systems, policies and procedures.

#### **2.16.1 Minimum Order**

The Supplier shall not have any minimum order value or volume requirements.

#### **2.16.2 Order Acknowledgement**

The Supplier shall acknowledge the receipt of an order by Customer immediately or within one (1) Business Day if requested by the Customer. The Supplier will include in this acknowledgement, any Products/Services ordered that cannot be fulfilled (e.g., back orders). The Customer, at its sole discretion may:

- (a) Cancel some or the entire order;
- (b) Ask the Supplier to ship only available Products/Services and cancel any backorders; and/or,
- (c) Agree to an alternative delivery schedule based on anticipated Product/Services availability.

#### **2.16.3 Order Changes and/or Cancellation**

The Supplier shall accept new orders, order changes and/or cancellation as may be required based on Customer's requirements, at no additional cost to the Customer.

#### **2.16.4 Coordinating Bulk Purchases**

The Supplier shall support coordinated bulk purchases initiated by OECM and/or Customers for several Customers during the Term. OECM or the Customer will ensure reasonable lead times for bulk purchases are requested.

OECM and/or Customers may consolidate various Customer volumes and coordinate bulk purchases. Once Products/Services have been received at Customer's location, the Supplier shall invoice each Customer accordingly.

#### **2.16.5 Electronic Commerce**

Customers currently use a variety of ERP, e-Procurement or financial systems (e.g., PeopleSoft, Jaggaer) for processing orders and payments. To support these processes, the Supplier will provide reasonable technology and implementation support, at any time during the Term, at no additional cost to the Customer.

### **2.17 Delivery**

All Products shall be Delivered Duty Paid ("DDP") to inside the door or the dock of the Customer's location as requested by the Customer.

The Supplier shall deliver orders with correct Products and quantities within the lead time and specific Customer locations, if requested.

#### **2.17.1 Delivery Lead Times**

The Supplier shall co-ordinate directly with the Customer regarding the status of orders, and delivery.

#### **2.17.2 Back Orders**

Back orders should be confirmed at the time of the order acknowledgement with an estimated delivery date, Customers will have an option to cancel or accept the back orders.

#### **2.17.3 Product Substitution**

The Supplier shall only substitute Products with approval from Customer's designated personnel.

#### **2.17.4 Damaged or Defective Shipment**

The Customer may not accept the delivery of the Products if they are:

- (a) Damaged (or the packaging is damaged);
- (b) Not delivered as agreed; or,
- (c) Substituted without prior approval of the Customer.

The Supplier shall be responsible for all shipping costs related to the return and replacement (e.g., immediately if required by Customer) of any damaged or defective Products from the Customer's location. Customers will not be responsible for any additional costs (e.g., re-stocking fees) due to damaged or defective Products received.

#### **2.17.5 Returns**

The Supplier shall accept all Products returned by the Customer that were ordered incorrectly and not used within thirty (30) days from delivery date, at no additional cost (e.g., restocking or shipping fee) to the Customer.

#### **2.17.6 Recalls**

The Supplier shall ensure that Products meet current safety standards and regulations and shall advise OEMC and Customers of any changes with regulatory agencies related to the Products, which may impact the future availability of Products, or support of the Products.

The Supplier shall immediately report recalled Products to OEMC and Customers advising applicable details (e.g., model number, serial number). Supplier shall comply with the requirements of any Applicable Law in respect to recalled Products and repair or replace the Product at no additional cost to Customer.

#### **2.17.7 Discontinued Products**

The Supplier shall not arbitrarily discontinue Products and shall provide the Customer with sufficient notice (e.g., within sixty (60) days) prior to discontinuation.

Further, the Supplier shall ensure that in the event a Product becomes unavailable and a replacement is proposed, the replacement Product shall have equal or greater functional capabilities/specifications than those of the retiring Product.

### **2.18 Invoicing**

Flexibility in invoicing processes is required. The Customer and Supplier can mutually agree to invoicing details when executing a CSA.

The invoices, in either paper or electronic format, as detailed in the Customer's CSA shall be itemized and contain, at a minimum, the following information:

- (a) Customer name and location;
- (b) Customer purchase order number (if applicable) and order date;
- (c) Description of Products/Services provided, quantities and Rates; and,
- (d) Harmonized Sales Tax ("HST") and total cost.

#### **2.18.1 Payment Terms and Methods**

The Customer's common payment terms are net thirty (30) days.

The Supplier shall accept payment from Customers by cheque, Purchasing Card, Visa Payables Automation (via ghost card) or Electronic Funds Transfer ("EFT") at no additional cost to the Customer.

Different payment terms may be agreed to when executing a CSA (e.g., 2%/10 early payment discount for Customers).

Note – Customer's payment terms will not be in effect until the Supplier provides an accurate invoice.

#### **2.18.2 Electronic Fund Transfer**

The Supplier shall provide the Customer with the necessary banking information to enable EFT, at no additional cost to the Customer, for any related invoice payments including, but not limited to:

- (a) A void cheque;
- (b) Financial institution's name;
- (c) Financial institution's transit number;
- (d) Financial institution's account number; and,
- (e) Email address for notification purposes.

#### **2.19 Rates**

The Product and Service Rates shall be:

- (a) Mutually agreed upon between the Customer and Supplier for the specific Product and Service requirements which may be the result of a Second Stage;
- (b) In Canadian funds and shall include all applicable costs, including, but not limited to overhead, materials, fuel, fuel surcharge, duties, tariffs, travel and carriage, delivery, office support, profit, permits, licences, labour, insurance, and Workplace Safety Insurance Board costs and all other overhead, office support, profit, licenses including any fees or other charges required by law; and,
- (c) Exclusive of the HST, or other similar taxes.

The Customer and Supplier will mutually agree on Rates and the process and timing for refreshing those Rates based on the Customer's Product and Service needs.

Rates for Customers outside of Ontario will be negotiated and mutually agreed upon by the Customer and Supplier.

#### **2.19.1 Travel Expenses**

Travel expenses shall be included in the cost of the Products and Services. However, in extenuating circumstances, the Supplier must obtain prior approval from the Customer for costs incurred as a result of accommodation or travel associated with a particular Assignment. These costs must be charged in accordance with the Customer's travel policy, as may be amended from time to time. Suppliers may obtain applicable rates from the Customer. All such pre-approved costs, where applicable, must be itemized separately on invoices.

Customers shall not be responsible for any meal, hospitality, or incidental expenses incurred by the Supplier, whether incurred while travelling or otherwise including,

- (a) Meals, snacks and beverages;
- (b) Gratuities;
- (c) Laundry or dry cleaning;
- (d) Valet services;
- (e) Dependent care;

- (f) Home management; and,
- (g) Personal telephone calls.

#### 2.19.2 OECM Cost Recovery Fee

As a not-for-profit/non-share capital corporation, OECM recovers its operating costs from its agreements through a Cost Recovery Fee ("CRF"). CRFs from the resulting Master Agreement from this RFSQ and other OECM agreements are structured to support OECM's financial model, while providing savings to Customers.

The Supplier shall pay to OECM a maximum CRF of two-point nine five percent (2.95%) on all Products and Services invoiced by the Supplier to the Customers throughout the Term.

CRF will be calculated as follows:

<b><u>EXAMPLE OF HOW CRF WILL BE CALCULATED WITH A CRF = 2.95%</u></b>				
<b>Sales per Quarter</b>	<b>Calculation</b>	<b>CRF</b>	<b>HST</b>	<b>Total CRF Payment to OECM</b>
If Supplier has \$100,000 total sales in first quarter	\$100,000 x 2.95% CRF	\$2,950	\$383.50	\$3,333.50
If Supplier has \$200,000 total sales in second quarter	\$200,000 x 2.95% CRF	\$5,900	\$767.00	\$6,667.00
If Supplier has \$50,000 total sales in third quarter	\$50,000 x 2.95% CRF	\$1,475	\$191.75	\$1,666.75
If Supplier has \$50,000 total sales in fourth quarter	\$50,000 x 2.95% CRF	\$1,475	\$191.75	\$1,666.75
<b>Total CRF Payment to OECM for <u>first year of the Master Agreement</u>:</b>				<b>\$13,334.00</b>

The CRF and applicable HST shall be paid to OECM quarterly, via EFT, by May 15, August 15, November 15 and February 15 throughout the Term as follows:

<b>Calendar Quarter</b>	<b>Months</b>	<b>CRF Payment Due Date</b>
1st Quarter	January, February, March	May 15
2nd Quarter	April, May, June	August 15
3rd Quarter	July, August, September	November 15
4th Quarter	October, November, December	February 15

The CRF will be reviewed (e.g., annually) and may, at OECM's sole discretion, be adjusted downwards for remaining Term.

The Supplier shall be responsible for paying interest, as specified in Article 4.08 of the Master Agreement, for late CRF payments.

Upon termination or expiry of the Master Agreement, the Supplier will submit all outstanding CRF payments within thirty (30) days of the Master Agreement termination or expiry date.

## **2.20 Supplier Support to Customers**

The Supplier shall provide effective support to Customers including, but not limited to:

- (a) Providing a responsive account executive (with applicable back-up) assigned to the Customer to support their needs by providing day-to-day and ongoing administrative support, and operational support;
- (b) Managing issue resolution in a timely manner;
- (c) Complying with agreed upon escalation processes to resolve outstanding issues;
- (a) Responding to Customer's inquiries (e.g., to day-to-day activities) within one (1) Business Day;
- (b) Ensuring minimal disruption to the Customer;
- (c) Providing easy access to the Supplier (e.g., online, toll free telephone number, email, voicemail, chat or fax);
- (d) Providing training/demonstrations, knowledge transfer, and no-cost educational events (e.g., webinars), if available;
- (e) Establishing an ongoing communications program with the Customer (e.g., new initiatives, innovation, sustainability);
- (f) Adhering to the Customer's confidentiality and privacy policies (e.g., related to student's private information);
- (g) Providing written notice to Customers on any scheduled shut down that would impact services (e.g., inventory count, relocation of warehouse, website maintenance);
- (h) Provide Customer reporting; and,
- (i) Attending meetings with Customers, as requested.

## **2.21 Supplier Management Support to OECM**

OECM will oversee the Master Agreement, and the Supplier shall provide appropriate Master Agreement management support including, but not limited to:

- (a) Assigning to OECM a Supplier Account Executive and team responsible for supporting and overseeing all aspects of the Master Agreement;
- (b) Working and acting in an ethical manner demonstrating integrity, professionalism, accountability, transparency and continuous improvement;
- (c) Promoting the Master Agreement within the Customer community;
- (d) Maintaining OECM's and Customer's confidentiality by not disclosing Confidential Information without the prior written consent of OECM and/or the Customer, as the case may be, as further described in Appendix A – Form of Master Agreement;
- (e) Attending business review meetings with OECM to review such information as:
  - i. CSAs and upcoming opportunities;
  - ii. Authorized Reseller status; and,
  - iii. Review and monitor performance management compliance;
- (f) Complying with Appendix D – OECM's Supplier Code of Conduct requirements as described on the OECM website at <https://oecm.ca/suppliers/#code-of-conduct>;
- (g) Managing issue resolution in a timely manner;
- (h) Complying with agreed upon escalation processes to resolve outstanding issues;

- (i) Timely submission of reports as described in Appendix B – Supplier Reporting Requirements; and,
- (j) Complying with Master Agreement close out processes (e.g., ensuring all Master Agreement obligations have been fulfilled, such as submission of final reporting and CRF payments to OECM).

#### **2.21.1 Master Agreement Award and Launch**

The Supplier will meet with OECM to discuss an effective launch strategy, and shall provide:

- (a) Supplier's profile and logo;
- (b) Supplier's contact information;
- (c) Customer engagement strategy;
- (d) Access to knowledge sharing materials (e.g., webinars);
- (e) Marketing materials; and,
- (f) Other relevant materials.

#### **2.21.2 Promoting OECM Master Agreements**

To support Customers, OECM and the Supplier will work together to encourage the use of the Master Agreement resulting from this RFSQ.

The Supplier will actively promote the Master Agreement to Customers which may include, but not be limited to:

- (a) Conducting sales and marketing activities directly to onboard Customers;
- (b) Executing CSAs with interested Customers;
- (c) Providing excellent and responsive Customer support;
- (d) Gathering and maintaining Customer and market intelligence, including contact information;
- (e) Identifying Customer savings; and,
- (f) Identifying improvement opportunities (e.g., new Products).

OECM will promote the use of the Master Agreement with Customers which may include, but not be limited to:

- (a) Using online communication tools to inform and educate;
- (b) Holding information sessions and webinars, as required;
- (c) Attending, where appropriate, Customer and Supplier events;
- (d) Facilitating CSA execution, where appropriate;
- (e) Facilitating Second Stage requests, as required;
- (f) Providing effective business relationship management;
- (g) Managing and monitoring Supplier performance;
- (h) Facilitating issue resolution; and,
- (i) Marketing Supplier promotions.

#### **2.21.3 Supplier Performance Management Scorecard**

To ensure Master Agreement requirements are met, the Supplier's performance will be measured and tracked by OECM as described in Appendix C – Supplier Performance Management Scorecard.

#### **2.21.4 Process to Add Other Products and Services**

During the Term the Supplier may request adding other Products and Services (e.g., newly available Products and Services) to the Master Agreement to align with Customer needs. OECM will review and assess the request and may accept or reject based on Products/Services in the current Master Agreement and Customer needs.

The Supplier shall provide written notice to OECM of at least one hundred and twenty (120) days if requesting a Product/Service refresh.

Additional Product/Service requests from the Supplier must be accompanied by appropriate documentation (e.g., Product and Service description, and rationale for the addition).

Volumes and Supplier's performance (i.e., as described in Appendix C – Supplier Performance Management Scorecard and/or Supplier Recognition Program evaluation results) will be considered when contemplating adding Products/Services. In the event the Supplier's performance is poor and/or unacceptable, OECM may not agree to the Supplier's Product/Service refresh request. All other Products/Services shall remain unchanged.

Based on above, the Master Agreement will be amended, if needed.

#### **2.21.5 Saving Calculation**

OECM tracks, validates, and reports on savings on all of its agreements. Collaborative procurement processes enables several types of savings including direct and indirect savings (e.g., process improvement, lead time reduction, standardization, economies of scale, cost avoidance).

The Supplier shall report Customer savings (e.g., environmental savings, total cost of ownership, cost avoidance and/or other savings).

#### **2.21.6 OECM's Supplier Recognition Program**

OECM's suppliers play a fundamental role in ensuring Customers' needs are met with consistent and exceptional service. As part of OECM's efforts to provide greater value to Customers and support their Supplier selection process across OECM agreements, OECM has a Supplier Recognition Program ("SRP"). Through the SRP, OECM objectively assesses supplier's performance using an open, fair and transparent framework to recognize and reward top-performing Suppliers on an annual basis.

Further details will be provided to the Suppliers.

#### **2.21.7 Reporting to OECM**

The Supplier shall be responsible for providing reports as further described in Appendix B – Supplier Reporting Requirements.

Report details will be discussed and established at the Master Agreement finalization stage between OECM and the Preferred Proponent. Other reports may be added, throughout the Term, if mutually agreed upon between OECM and the Supplier, and/or the Customer and Supplier.

[End of Part 2]

## PART 3 – EVALUATION OF PROPOSALS

### 3.1 Stages of Proposal Evaluation

OECM will conduct the evaluation of Proposals in the following stages:

Stage	Description	Refer to RFSQ Section	Scoring Methodology and Maximum Points (if applicable)	Minimum Threshold Requirement (if any)
Stage I	Qualification Response	3.2	Pass/Fail	Pass
Stage II	Technical Response	3.3	100	65 Points
Stage III	Tie Break Process	3.4	No Point Allocation	No Point Allocation
Stage IV	Negotiations	3.5	Not Applicable	Not Applicable
Stage V	Master Agreement Finalization	3.6	Not Applicable	Not Applicable

### 3.2 Stage I – Review of Qualification Responses (Pass/Fail)

Stage I will consist of a review to determine which Proposals comply with all qualification requirements.

The Proponent must complete the following forms in Ontario's Tenders Portal ("OTP") to qualify and proceed to the next stage of evaluation.

Title	OTP Envelope
Qualification Response	Qualification
Appendix G – OEM Authorized Reseller Letter (if applicable)	Qualification

If the Proponent fails to insert information contained in the above forms, OECM may provide an opportunity to rectify such deficiency within a period of two (2) Business Days from notification thereof. Only Proponents satisfying the identified deficiencies within allotted time will proceed to Stage II.

Other than inserting the information requested on the qualification submission forms set out above, the Proponent may not make any changes to any of the forms. Any Proposal containing any such changes, whether on the face of the form or elsewhere in the Proposal, may be disqualified.

A Proposal may not be evaluated further if the Proponent is a U.S. Business. A Proponent shall represent and warrant in its Proposal that it is not a U.S. Business.

### 3.3 Stage II – Technical Response

Stage II will consist of an evaluation and scoring of the Technical Response of each Eligible Proposal.

The Technical Response includes a series of questions the Proponent is required to respond to in order to demonstrate the Proponent's ability to fulfill the RFSQ Deliverables. Only information contained within the Technical Response will be evaluated in Stage II.

Only Eligible Proposals that meet or exceed the minimum thresholds will receive a pass in this stage and proceed to Stage III of the evaluation process. While the overall threshold for the Technical Response is sixty-five percent (65%) or sixty-five (65) points, the Technical Response section 1 is the only individual section that has a minimum threshold of eighteen (18) points.

Point allocations for the Technical Response sections are as follows:

Technical Response Sections	Available Points	Minimum Threshold, if any
1. Proponent's Experience and Qualifications	30	18 Points
2. Process and Methodology	40	Not Applicable
3. Performance, Accessibility and Service Outcomes	18	Not Applicable
4. ESG Considerations	12	Not Applicable
<b>TOTAL POINTS:</b>	<b>100</b>	<b>65</b>

Detailed sub-point allocations and minimum thresholds are set out in the Technical Response on OTP.

In the case that contradictory information or information that contains conditional statements is provided, OECM will determine whether the response complies with the requirements and may seek clarification from the Proponent.

An Eligible Proposal that does not respond to a particular question (e.g., it is left blank) or contains a response of N/A or not applicable will receive a zero (0) score.

### 3.4 Stage III – Tie Break Process

At this stage, where two (2) or more of the highest scoring Eligible Proposals achieve a tie score on completion of the Stage II, OECM may invite all Proponents to negotiations or break the tie by selecting the Eligible Proposal with the highest score in Stage II – Technical Response, Section 2 Process and Methodology.

### 3.5 Stage IV – Negotiations

Concurrent negotiations, with the Preferred Proponents, will be based on the RFSQ Deliverables, and the Proposals, understanding that OECM is seeking the best overall solution and value for money for Customers.

The negotiations may include:

- (a) RFSQ Deliverables;
- (b) Master Agreement management (e.g., performance, KPIs, penalties, reporting);
- (c) Master Agreement terms and conditions; and,
- (d) Additional references, if required;

OECM may also request supplementary information from a Preferred Proponent to verify, clarify or supplement the information provided in its Proposal or confirm the conclusions reached in the evaluations.

OECM intends to complete negotiations within fifteen (15) calendar days after notification. If, for any reason, OECM and a Preferred Proponent fail to reach an agreement within the aforementioned timeframe, OECM may:

- i. Terminate negotiations with that particular Preferred Proponent;
- ii. Extend the negotiation timeline; or,
- iii. Publish one (1) or some of the Suppliers, who have executed Master Agreements, within our promotional marketing launch.

Other Master Agreements, if successfully negotiated with other Preferred Proponents would be added to OECM's website at a later date.

Upon successful negotiations, the Preferred Proponent will be invited to execute a Master Agreement.

### **3.6 Stage V – Master Agreement Finalization**

The Preferred Proponent will be given five (5) Business Days to execute the Master Agreement, unless otherwise specified by OECM. Once the Master Agreement has been executed, Customers may execute a CSA.

OECM shall at all times be entitled to exercise its rights under Section 4.6.

[End of Part 3]

## PART 4 – TERMS AND CONDITIONS OF THE RFSQ PROCESS

### 4.1 General Information and Instructions

#### Procurement Process Non-Binding

This RFSQ process is non-binding, and it does not intend to create, and shall not create, a formal legally binding procurement process, and shall not give rise to the legal rights or duties applied to a formal legally binding procurement process. This procurement process shall instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

- (a) This RFSQ shall not give rise to any contract A – based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and,
- (b) Neither the Proponent nor OECM shall have the right to make any breach of contract, tort or other claims against the other with respect to the award of a Master Agreement, failure to award a Master Agreement or failure to honour a response to this RFSQ.

#### 4.1.1 RFSQ Timetable

The following is a summary of the key dates for this RFSQ process:

RFSQ Timetable	
Event	Time/Date
OECM's Issue Date of Request for Supplier Qualifications:	September 25, 2025
Proponent's Information and Ontario Tenders Portal Demonstration Session:	2:00 pm on October 1, 2025
Proponent's Deadline to Submit Questions:	5:00 pm on October 3, 2025
OECM's Deadline for Issuing Answers:	October 10, 2025
Proponent's Deadline to Submit Questions Related to Addenda & Question and Answer Documents:	5:00 pm on October 16, 2025
OECM's Deadline for Issuing Final Documents:	October 23, 2025
Proponent's Intent to Submit a Proposal:	October 27, 2025
Closing Date:	2:00:00 pm on October 31, 2025
Anticipated Master Agreement Start Date:	January 2026

Note – all times specified in this RFSQ timetable are local times in Toronto, Ontario, Canada.

OECM may amend any timeline, including the Closing Date, without liability, cost, or penalty, and within its sole discretion.

In the event of any change in the Closing Date, the Proponent may thereafter be subject to the extended timeline.

#### 4.1.2 Proponent's Information and OTP Demonstration Session

The Proponent should participate in the Proponent's Information and OTP Demonstration Session, which will take place at the time set out in Section 4.1.1.

Prior to the Proponent's Information and OTP Demonstration Session, OECM will send a **Message** via OTP with the teleconference and webinar information to the Proponents who expressed interest on OTP.

The Proponent's Information and OTP Demonstration Session is an opportunity for the Proponent to enhance its understanding of the RFSQ process and to learn how to use OTP to submit its Proposal.

Any changes to the Proponent's Information and OTP Demonstration Session meeting date will be issued in an addendum on OTP.

Information provided during this session will be posted on OTP.

In the event of a conflict or inconsistency between the Proponent's Information and OTP Demonstration Session and the RFSQ, the RFSQ shall prevail.

The Proponent can contact OTP technical support directly for further assistance, using the contact details set out in Section 4.3.1.

#### **4.1.3 Proponent to Follow Instructions**

The Proponent should structure its Proposal in accordance with the instructions in this RFSQ. Where information is requested in this RFSQ, any response made in the Proposal should reference the applicable section numbers of this RFSQ where that request was made.

#### **4.1.4 OECM's Information in RFSQ Only an Estimate**

OECM makes no representation, warranty or guarantee as to the accuracy of the information contained in this RFSQ or issued by way of addenda. Any data contained in this RFSQ or provided by way of addenda are estimates only and are for the sole purpose of indicating to Proponents the general size of the work.

It is the Proponent's responsibility to avail itself of all the necessary information to prepare a Proposal in response to this RFSQ.

#### **4.1.5 Proponent's Costs**

The Proponent will bear all costs and expenses incurred relating to any aspect of its participation in this RFSQ process, including all costs and expenses relating to the Proponent's participation in:

- (a) The preparation and submission of its Proposal;
- (b) The Proponent's attendance at any meeting related to the RFSQ process, including any in relation to the RFSQ process;
- (c) The conduct of any due diligence on its part, including any information gathering activity;
- (d) The preparation of the Proponent's own questions; and,
- (e) Any discussion and/or finalization, if any, in respect of the Form of Master Agreement.

### **4.2 Communication after RFSQ Issuance**

#### **4.2.1 Communication with OECM**

All communications regarding any aspect of this RFSQ must be sent to OECM as a **Message** in OTP.

If the Proponent fails to comply with the requirement to direct all communications to OECM through OTP, it may be disqualified from this RFSQ process. Without limiting the generality of this provision, Proponents shall not communicate with or attempt to communicate with the following as it relates to this RFSQ:

- (a) Any employee or agent of OECM;
- (b) Any project advisor;

- (c) Any member of OECM's governing body (such as Board of Directors, or advisors);
- (d) Any employee, consultant or agent of OECM's Customers; and,
- (e) Any elected official of any level of government, including any advisor to any elected official.

#### **4.2.2 Proponent to Review RFSQ**

The Proponent shall promptly examine this RFSQ and all Appendices, including the Form of Master Agreement and:

- (a) Shall report any errors, omissions or ambiguities; and,
- (b) May direct questions or seek additional information on or before the Proponent's Deadline to Submit Questions to OECM.

All questions submitted by Proponents shall be deemed to be received once the **Message** has entered into OECM's OTP inbox.

In answering a Proponent's questions, OECM will set out the question, without identifying the Proponent that submitted the question and OECM may, in its sole discretion:

- (a) Edit the question for clarity;
- (b) Exclude questions that are either unclear or inappropriate; and,
- (c) Answer similar questions from various Proponents only once.

Where an answer results in any change to the RFSQ, such answer will be formally evidenced through the issue of a separate addendum for this purpose.

To ensure the Proponent clearly understand issued addenda, OECM allows Proponents to ask questions related to addenda, and question and answer documents. Refer to Section 4.1.1 for timelines.

OECM is under no obligation to provide additional information but may do so at its sole discretion.

It is the responsibility of the Proponent to seek clarification, by submitting questions to OECM through OTP, on any matter it considers to be unclear. OECM shall not be responsible for any misunderstanding on the part of the Proponent concerning this RFSQ or its process.

#### **4.2.3 Proponent's Intent to Submit Proposal**

The Proponent should inform OECM, via OTP **Message**, by the date specified in the RFSQ Timetable noted in Section 4.1.1 of the RFSQ, if it intends to submit a Proposal in response to this RFSQ.

#### **4.2.4 Proponent to Notify**

In the event the Proponent has any reason to believe that an error, omission, uncertainty or ambiguity, as set out in Section 4.2.2 exists, the Proponent must notify OECM through OTP prior to submitting a Proposal.

If appropriate, OECM will then clarify the matter for the benefit of all Proponents.

The Proponent shall not:

- (a) After submission of a Proposal, claim that there was any misunderstanding or that any of the circumstances set out in Section 4.2.2 were present with respect to the RFSQ; and,
- (b) Claim that OECM is responsible for any of the circumstances listed in Section 4.2.2 of this RFSQ.

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

This RFSQ may only be amended by an addendum in accordance with this Section.

If OECM, for any reason, determines that it is necessary to provide additional information relating to this RFSQ, such information will be communicated to all Proponents by addenda on OTP. Each addendum shall form an integral part of this RFSQ.

Any amendment or supplement to this RFSQ made in any other manner will not be binding on OECM.

Such addenda may contain important information including significant changes to this RFSQ. The Proponent is responsible for obtaining all addenda issued by OECM.

The Proponent who intends to respond to this RFSQ is requested not to cancel the receipt of addenda or amendments option provided by OTP, since it must obtain all information and documents that are issued on OTP.

In the event that a Proponent chooses to cancel the receipt of addenda or amendments, its Proposal may be rejected.

#### **4.3 Proposal Submission Requirements**

##### **4.3.1 General**

The Proponent shall submit its Proposal through OTP at

<https://ontariotenders.app.jaggaer.com/esop/nac-host/public/web/login.html>.

The Proponent should contact OTP technical support if it experiences technical difficulties or to seek support about the use of OTP via:

- (a) The form on the OTP at <https://jaggaer.my.site.com/SupplierSupportRequest/s/>;
- (b) By phone at 866-722-7390; or,
- (c) Accessing website information at [https://ontariotenders.app.jaggaer.com/esop/nac-host/public/attach/eTendering\\_responding\\_to\\_tender\\_guide.pdf](https://ontariotenders.app.jaggaer.com/esop/nac-host/public/attach/eTendering_responding_to_tender_guide.pdf).

To be considered in the RFSQ process, a Proposal must be submitted and received **before** the Closing Date as set out in Section 4.1.1 and on OTP.

**The Proponent is strongly encouraged to become familiar with the use of OTP well in advance of the Closing Date.**

The Proponent will not be able to submit a Proposal after the Closing Date, as OTP will close the access to the RFSQ on the Closing Date.

A Proposal sent by, email, facsimile, mail and/or any other means other than stated in this RFSQ shall **not** be considered. Notwithstanding anything to the contrary contained in any applicable statute relating to electronic documents transactions, including the *Electronic Commerce Act, 2000*, S.O. 2000, c. 17, any notice, submission, statement, or other instrument provided in respect of the RFSQ may not be validly delivered by way of electronic communication, unless otherwise provided for in this RFSQ.

##### **4.3.2 Proposal in English**

All Proposal submissions are to be in English only. Any Proposal received by OECM that is not entirely in the English language may be disqualified.

##### **4.3.3 Proposal Submission Requirements**

The Proponent is solely responsible for submitting its Proposal on OTP prior to the Closing Date.

The Proposal should be submitted in accordance with the instructions set out on OTP and in this RFSQ as set out below.

Description	OTP Envelope	Complete within OTP
Qualification Response	Qualification	✓
Technical Response	Technical	✓
Appendix G – OEM Authorized Reseller Letter (if applicable)	Qualification	✓

#### 4.3.4 Other Proposal Considerations

In preparing its Proposal, the Proponent should adhere to the following:

- (a) Information contained in any embedded link will not be considered part of a Proposal, and will not be evaluated or scored;
- (b) Completely address, on a point-by-point basis, each Technical Response question in Technical Response. Technical Responses left blank and/or unanswered will receive a score of zero (0). Refer to Section 3.3;
- (c) Information attached as part of the Commercial Envelope in OTP will not be considered as part of the evaluation of Stage II - Technical Response. Refer to Section 3.3; and,
- (d) The Proposal should be complete in all respects. Proposal evaluation and scoring applies only to the information contained in the Proposal, or accepted clarifications as set out in Section 4.3.13 Clarification of Proposals.

#### 4.3.5 Proposal Receipt by OECM

Every Proposal received will be date/time stamped by OTP.

A Proponent should allow sufficient time in the preparation of its Proposal to ensure its Proposal is received on or before the Closing Date.

#### 4.3.6 Withdrawal of Proposal

A Proponent may withdraw its Proposal by deleting its submission on OTP before the Closing Date or at any time throughout the RFSQ process until the execution of a Master Agreement. To withdraw a Proposal after the Closing Date, the Proponent should send a **Message** to OECM through OTP.

#### 4.3.7 Amendment of Proposal on OTP

A Proponent may amend its Proposal after submission through OTP, but only if the Proposal is amended and resubmitted before the Closing Date.

#### 4.3.8 Completeness of Proposal

By submitting a Proposal, the Proponent confirms that all components required to use and/or manage the Products/Services have been identified in its Proposal or will be provided to OECM or its Customers at no additional cost. Any requirement that may be identified by the Proponent after the Closing Date or subsequent to signing the Master Agreement shall be provided at the Proponent's expense.

#### 4.3.9 Proposals Retained by OECM

All Proposals submitted by the Closing Date shall become the property of OECM and will not be returned to the Proponent.

#### **4.3.10 Acceptance of RFSQ**

By submitting a Proposal, a Proponent agrees to accept the terms and conditions contained in this RFSQ, and all representations, terms, and conditions contained in its Proposal.

#### **4.3.11 Amendments to RFSQ**

Subject to Section 4.1.1 and Section 4.2.4, OECM shall have the right to amend or supplement this RFSQ in writing prior to the Closing Date. No other statement, whether written or oral, shall amend this RFSQ. The Proponent is responsible to ensure it has received all addenda.

#### **4.3.12 Proposals will not be Opened Publicly**

The Proponent is advised that there will not be a public opening of this RFSQ. OECM will open Proposals at a time subsequent to the Closing Date.

#### **4.3.13 Clarification of Proposals**

OECM shall have the right at any time after the Closing Date to seek clarification from any Proponent in respect of the Proposal, without contacting any other Proponent.

OECM will exercise this right in a similar manner for all Proponents.

Any clarification sought shall not be an opportunity for the Proponent to either correct errors or to change its Proposal in any substantive manner. Subject to the qualification in this provision, any written information received by OECM from a Proponent in response to a request for clarification from OECM may be considered, if accepted, to form an integral part of the Proposal.

OECM shall not be obliged to seek clarification of any aspect of any Proposal.

#### **4.3.14 Verification of Information**

OECM shall have the right, in its sole discretion, to:

- (a) Verify any Proponent's statement or claim made in its Proposal or made subsequently in a clarification, or discussion by whatever means OECM may deem appropriate, including contacting persons in addition to those offered as references, and to reject any Proponent statement or claim, if such statement or claim or its Proposal is patently unwarranted or is questionable, which may result in changes to the scores for the Proponent's Technical Response; and,
- (b) Access the Proponent's premises where any part of the work is to be carried out to confirm Proposal information, quality of processes, and to obtain assurances of viability, provided that, prior to providing such access, the Proponent and OECM shall have agreed on access terms including pre-notification, extent of access, security and confidentiality. OECM and the Proponent shall each bear its own costs in connection with access to each other's premises.

The Proponent shall co-operate in the verification of information and is deemed to consent to OECM verifying such information, including references.

#### **4.3.15 Proposal Acceptance**

The lowest price Proposal or any Proposal shall not necessarily be accepted. While price is an evaluation criterion, other evaluation criteria as set out in Part 3 will form a part of the evaluation process.

#### **4.3.16 RFSQ Incorporated into Proposal**

All provisions of this RFSQ are deemed to be accepted by each Proponent and incorporated into each Proposal.

#### **4.3.17 Exclusivity of Contract**

The Master Agreement, if any, with the Preferred Proponent will not be an exclusive agreement for the provision of the described Deliverables.

#### **4.3.18 Substantial Compliance**

OECM shall be required to reject Proposals, which are not substantially compliant with this RFSQ.

#### **4.3.19 No Publicity or Promotion**

No Proponent, including the Preferred Proponent, shall make any public announcement or distribute any literature regarding this RFSQ or otherwise promote itself in connection with this RFSQ or any arrangement entered into under this RFSQ without the prior written approval of OECM.

In the event that a Proponent, including the Preferred Proponent, makes a public statement either in the media or otherwise in breach of this requirement, in addition to any other legal remedy it may have in law, in equity or within the context of this RFSQ, OECM shall be entitled to take all reasonable steps as may be deemed necessary by OECM, including disclosing any information about a Proposal, to provide accurate information and/or to rectify any false impression which may have been created.

### **4.4 Negotiations, Timelines, Notification and Debriefing**

#### **4.4.1 Negotiations with Preferred Proponent**

OECM reserves the right to accept or reject any Proposals in whole or in part; to waive irregularities and omissions, if doing so is in the best interests of OECM and its Customers.

The Preferred Proponent shall execute the Master Agreement in the form attached to this RFSQ with negotiated changes, if any, and satisfy any other applicable conditions of this RFSQ within twenty (20) days of invitation to enter into negotiations. This provision is solely to the benefit of OECM and may be waived by OECM at its sole discretion.

If the Preferred Proponent and OECM cannot execute the Master Agreement within the allotted twenty (20) days, OECM will, as described in Section 3.5, Stage IV - Negotiations, be at liberty to extend the timeline, terminate discussions/negotiations with the Preferred Proponent, or publish one (1) or some of the Suppliers, who have executed Master Agreements within OECM's promotional marketing launch. Other Master Agreements, if successfully negotiated with other Preferred Proponents would be added to OECM's website at a later date.

#### **4.4.2 Failure to Execute a Master Agreement**

When the Preferred Proponent successfully reaches an agreement with OECM at the end of the negotiation process in accordance with the evaluation set out in this RFSQ, the Preferred Proponent will be allotted five (5) Business Days to execute the Master Agreement unless otherwise specified by OECM.

If the Preferred Proponent cannot execute the Master Agreement within the allotted timeframe, OECM may rescind the invitation to execute a Master Agreement or publish one (1) or some of the Suppliers, who have executed Master Agreements within OECM's promotional marketing launch. Other Master Agreements, if successfully negotiated with other Preferred Proponents would be added to OECM's website at a later date.

In accordance with the process rules in this Part 4 – Terms and Conditions of the RFSQ Process, there will be no legally binding relationship created with any Proponent prior to the execution of a written agreement.

#### **4.4.3 Master Agreement**

If a Master Agreement is subsequently negotiated and awarded to a Preferred Proponent as a result of this RFSQ process:

- (a) Any such Master Agreement will commence upon signature by the duly authorized representatives of OECM and the Preferred Proponent; and,
- (b) May include, but not be limited to, the general Master Agreement terms contained in Appendix A – Form of Master Agreement.

#### **4.4.4 Notification to Other Proponents**

Once the Master Agreement is executed, other Proponents will be notified directly in writing and shall be notified by public posting in the same manner that the RFSQ was originally posted of the outcome of the procurement process and the award of the contract.

#### **4.4.5 Debriefing**

Any Proponent may request a debriefing after receipt of a notification of award. All requests must be in writing to OECM and should be made within sixty (60) days of notification of award. The intent of the debriefing information session is to aid the Proponent in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

#### **4.4.6 Bid Dispute Resolution**

In the event that the Proponent wishes to review the decision of OECM in respect of any material aspect of the RFSQ process, and subject to having attended a debriefing, the Proponent shall submit a protest in writing to OECM within ten (10) days from such a debriefing.

Any request that is not timely received will not be considered and the Proponent will be notified in writing.

A protest in writing should include the following:

- (a) A specific identification of the provision and/or procurement procedure that is alleged to have been breached;
- (b) A specific description of each act alleged to have breached the procurement process;
- (c) A precise statement of the relevant facts;
- (d) An identification of the issues to be resolved;
- (e) The Proponent's arguments and supporting documentation; and,
- (f) The Proponent's requested remedy.

For the purpose of a protest, OECM will review and address any protest in a timely and appropriate manner. OECM will engage an independent and impartial third party should the need arise.

### **4.5 Prohibited Communications, and Confidential Information**

#### **4.5.1 Confidential Information of OECM**

All correspondence, documentation, and information of any kind provided to any Proponent in connection with or arising out of this RFSQ or the acceptance of any Proposal:

- (a) Remains the property of OECM and shall be removed from OECM's premises only with the prior written consent of OECM;
- (b) Must be treated as confidential and shall not be disclosed except with the prior written consent of OECM;
- (c) Must not be used for any purpose other than for replying to this RFSQ and for the fulfillment of any related subsequent agreement; and,
- (d) Must be returned to OECM upon request.

#### **4.5.2 Confidential Information of the Proponent**

Except as provided for otherwise in this RFSQ, or as may be required by Applicable Laws, OECM shall treat the Proposal and any information gathered in any related process as confidential, provided that such obligation shall not include any information that is or becomes generally available to the public other than as a result of disclosure by OECM.

During any part of this RFSQ process, OECM or any of its representatives or agents shall be under no obligation to execute a confidentiality agreement.

In the event that a Proponent refuses to participate in any required stage of the RFSQ because OECM has refused to execute any such confidentiality agreement, the Proponent shall receive no points for that particular stage of the evaluation process.

#### **4.5.3 Proponent's Submission**

All correspondence, documentation, and information provided in response to or because of this RFSQ may be reproduced for the purposes of evaluating the Proposal.

If a portion of a Proposal is to be held confidential, such provisions must be clearly identified in the Proposal.

#### **4.5.4 Personal Information**

Personal Information shall be treated as follows:

- (a) Submission of information – The Proponent should not submit as part of its Proposal any information related to the qualifications or experience of persons who will be assigned to provide Products/Services unless specifically requested. OECM shall maintain the information for a period of seven (7) years from the time of collection. Should OECM request such information, OECM will treat this information in accordance with the provisions of this Section;
- (b) Use – Any personal information as defined in the *Personal Information Protection and Electronic Documents Act, S.C. 2005, c.5* that is requested from a Proponent by OECM shall only be used to select the qualified individuals to undertake the Products/Services and to confirm that the work performed is consistent with these qualifications; and,
- (c) Consent – It is the responsibility of the Proponent to obtain the consent of such individuals prior to providing the information to OECM. OECM will consider that the appropriate consents have been obtained for the disclosure to and use by OECM of the requested information for the purposes described.

#### **4.5.5 Non-Disclosure Agreement**

OECM reserves the right to require any Proponent to enter into a non-disclosure agreement satisfactory to OECM.

#### **4.5.6 Freedom of Information and Protection of Privacy Act**

The *Freedom of Information and Protection of Privacy Act (Ontario)*, applies to information provided by the Proponent. A Proponent should identify any information in its Proposal, or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by OECM and its Customers. The confidentiality of such information will be maintained by OECM, except as otherwise required by law or by order of a court, tribunal, or the Ontario Privacy Commissioner.

By submitting a Proposal, including any Personal Information requested in this RFSQ, the Proponent agrees to the use of such information for the evaluation process, for any audit of this procurement process, and for contract management purposes.

#### **4.5.7 Municipal Freedom of Information and Protection of Privacy Act**

The *Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M. 56* applies to information provided by the Proponent. A Proponent should identify any information in its Proposal, or any accompanying documentation supplied in confidence for which confidentiality is to

be maintained by OECM and its Customers. The confidentiality of such information will be maintained by OECM, except as otherwise required by law or by order of a court, tribunal, or the Ontario Privacy Commissioner.

By submitting a Proposal, including any Personal Information requested in this RFSQ, the Proponent agrees to the use of such information for the evaluation process, for any audit of this procurement process, and for contract management purposes.

#### **4.5.8 Intellectual Property**

The Proponent shall not use any intellectual property of OECM or Customers including, but not limited to, logos, registered trademarks, or trade names of OECM or Customers, at any time without the prior written approval of OECM and the respective Customer.

### **4.6 Reserved Rights and Governing Law of OECM**

#### **4.6.1 General**

In addition to any other express rights or any other rights, which may be, implied in the circumstances, OECM reserves the right to:

- (a) Make public the names of any or all Proponents;
- (b) Request written clarification or the submission of supplementary written information from any Proponent and incorporate such clarification or supplementary written information, if accepted, into the Proposal, at OECM's discretion, provided that any clarification or submission of supplementary written information shall not be an opportunity for the Proponent to correct errors in its Proposal or to change or enhance the Proposal in any material manner;
- (c) Waive formalities and accept Proposals that substantially comply with the requirements of this RFSQ;
- (d) Verify with any Proponent or with a third party any information set out in a Proposal;
- (e) Check references other than those provided by Proponents;
- (f) With supporting evidence, disqualify any Proponent on grounds such as:
  - i. Bankruptcy or insolvency;
  - ii. False declarations;
  - iii. Significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior agreement or agreements;
  - iv. Final judgments in respect of serious crimes or other serious offence; or,
  - v. Professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Proponent;
- (g) Disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information;
- (h) Disqualify any Proponent whose Proposal is determined by OECM to be non-compliant with the requirements of this RFSQ;
- (i) Disqualify any Proponent that is, or at anytime becomes prior to the award of the Master Agreement, a U.S. Business;
- (j) Disqualify a Proposal based upon the past performance or on inappropriate conduct in a prior procurement process, or where the Proponent has or the principals of a Proponent have previously breached an agreement with OECM, or has otherwise failed to perform such agreement to the reasonable satisfaction of OECM (i.e., has not submitted required reporting and/or Cost Recovery Fees to OECM);

- (k) Disqualify any Proponent, who, in relation to this RFSQ or the evaluation and selection process, has engaged directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the Supplier.
- (l) Disqualify the Proponent who has been charged or convicted of an offence in respect of an agreement with OECM, or who has, in the opinion of OECM, engaged in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion, unethical conduct, including lobbying as described above or other forms of deceitfulness, or other inappropriate communications offering gifts to any employees, officers, agents, elected or appointed officials or other representatives of OECM, or where the Proponent reveals a Conflict of Interest or Unfair Advantage in its Proposal or a Conflict of Interest or evidence of any Unfair Advantage is brought to the attention of OECM;
- (m) Disqualify any Proposal of any Proponent who has breached any Applicable Laws or who has engaged in conduct prohibited by this RFSQ, including where there is any evidence that the Proponent or any of its employees or agents colluded with any other Proponent, its employees or agents in the preparation of the Proposal;
- (n) Make changes, including substantial changes, to this RFSQ provided that those changes are issued by way of addenda in the manner set out in this RFSQ;
- (o) Accept or reject a Proposal if only one (1) Proposal is submitted;
- (p) Reject a Subcontractor proposed by a Proponent within a Consortium;
- (q) Select any Proponent other than the Proponent whose Proposal reflects the lowest cost to OECM;
- (r) Cancel this RFSQ process at any stage and issue a new RFSQ for the same or similar requirements, including where:
  - i. OECM determines it would be in the best interest of OECM not to award a Master Agreement,
  - ii. the Proposal prices exceed the bid prices received by OECM for Products/**Services** acquired of a similar nature and previously done work,
  - iii. the Proposal prices exceed the costs OECM or its Customers would incur by doing the work, or most of the work, with its own resources,
  - iv. the Proposal prices exceed the funds available for the Products/**Services**, or,
  - v. the funding for the acquisition of the proposed Products/**Services** has been revoked, modified, or has not been approved,

and where OECM cancels this RFSQ, OECM may do so without providing reasons, and OECM may thereafter issue a new request for proposals, request for supplier qualifications, sole source, or do nothing;

- (s) Discuss with any Proponent different or additional terms to those contained in this RFSQ or in any Proposal;
- (t) Accept any Proposal in whole or in part;
- (u) Reject any or all Proposals in its absolute discretion, including where a Proponent has launched legal proceedings against OECM and/or its Customers or is otherwise engaged in a dispute with OECM and/or its Customers;

and these reserved rights are in addition to any other express rights or any other rights which may be implied in the circumstances and OECM shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Proponent or any third party resulting from OECM exercising any of its express or implied rights under this RFSQ.

By submitting a Proposal, the Proponent authorizes the collection by OECM of the information set out under (d) and (e) in the manner contemplated in those subparagraphs.

#### **4.6.2 Rights of OECM – Proponent**

In the event that the Preferred Proponent fails or refuses to execute the Master Agreement within allotted time from being notified, OECM may, in its sole discretion:

- (a) Extend the period for concluding the Master Agreement, provided that if substantial progress towards executing the Master Agreement is not achieved within a reasonable period of time from such extension, OECM may, in its sole discretion, terminate the discussions;
- (b) Exclude the Preferred Proponent from further consideration and begin discussions with the next highest scoring Proponent without becoming obligated to offer to negotiate with all Proponents; or,
- (c) Exercise any other applicable right set out in this RFSQ including, but not limited to, cancelling the RFSQ and issuing a new RFSQ for the same or similar Products/Services.

OECM may also cancel this RFSQ in the event the Preferred Proponent fails to obtain any of the permits, licences, and approvals required pursuant to this RFSQ.

#### **4.6.3 No Liability**

The Proponent agrees that:

- (a) Any action or proceeding relating to this RFSQ process shall be brought in any court of competent jurisdiction in the Province of Ontario and for that purpose the Proponent irrevocably and unconditionally attorns and submits to the jurisdiction of that Ontario court;
- (b) It irrevocably waives any right to and shall not oppose any Ontario action or proceeding relating to this RFSQ process on any jurisdictional basis; and,
- (c) It shall not oppose the enforcement against it, in any other jurisdiction, of any judgement or order duly obtained from an Ontario court as contemplated by this RFSQ.

The Proponent further agrees that if OECM commits a material breach of OECM's obligations pursuant to this RFSQ, OECM's liability to the Proponent, and the aggregate amount of damages recoverable against OECM for any matter relating to or arising from that material breach, whether based upon an action or claim in contract, warranty, equity, negligence, intended conduct, or otherwise, including any action or claim arising from the acts or omissions, negligent or otherwise, of OECM, shall be no greater than the Proposal preparation costs that the Proponent seeking damages from OECM can demonstrate. In no event shall OECM be liable to the Proponent for any breach of OECM's obligations pursuant to this RFSQ, which does not constitute a material breach thereof. The Proponent acknowledges and agrees that the provisions of the *Broader Public Sector Accountability Act, 2010* shall apply notwithstanding anything contained herein.

#### **4.6.4 Assignment**

The Proponent shall not assign any of its rights or obligations hereunder during this RFSQ process without the prior written consent of OECM. Any act in derogation of the foregoing shall be null and void.

#### **4.6.5 Entire RFSQ**

This RFSQ and all Appendices form an integral part of this RFSQ.

#### **4.6.6 Reservation of Copyright**

This work, including all addenda, schedules, appendices, and attachments hereto, is protected by copyright law. OECM, as the copyright holder, hereby reserves all rights, including but not limited to the rights of reproduction, distribution, display, performance, adaptation, and translation. No part of this work may be reproduced, distributed, or used in any form or by any means, electronic or mechanical, in whole or in part, without the prior written permission of OECM. This includes, without limitation, the right to create derivative works, to authorize others to exercise these rights, and to enforce these rights. Any unauthorized use, reproduction, distribution of this work, in whole or in part,

will constitute a violation of the OECM's copyright and will be pursued to the fullest extent permitted by law, including legal prosecution.

#### **4.6.7 Priority of Documents**

In the event of any inconsistencies between the terms, conditions, and provisions of the main part of the RFSQ and the Appendices, the RFSQ shall prevail over the Appendices during this RFSQ process.

#### **4.6.8 Disqualification for Misrepresentation**

OECM may disqualify the Proponent or rescind a Master Agreement subsequently entered if the Proponent's Proposal contains misrepresentations or any other inaccurate, misleading or incomplete information.

#### **4.6.9 References and Past Performance**

The evaluation may include information provided by the Proponent's references and may also consider the Proponent's past performance with OECM and/or its Customers.

#### **4.6.10 Cancellation**

OECM may cancel or amend the RFSQ process without liability at any time.

#### **4.6.11 Competition Act**

Under Canadian law, a Proposal must be prepared without conspiracy, collusion, or fraud. For more information, refer to the Competition Bureau website at <http://www.competitionbureau.gc.ca/eic/site/cb-bc.nsf/eng/home>, and in particular, part VI of the *Competition Act*, R.S.C. 1985, c. C-34.

#### **4.6.12 Trade Agreements**

The Proponent should note that procurements coming within the scope of either Chapter 5 of the Canadian Free Trade Agreement, Chapter 19 of the Comprehensive Economic and Trade Agreement ("CETA") or within the scope of the Trade and Cooperation Agreement between Quebec and Ontario are subject to such agreements, although the rights and obligations of the parties shall be governed by the specific terms of this RFSQ.

For more information, refer to the following:

- (a) Canadian Free Trade Agreement website at <https://www.cfta-alec.ca/>;
- (b) Trade and Cooperation Agreement between Quebec and Ontario at <https://www.cfta-alec.ca/agreement/trade-and-cooperation-agreement-between-quebec-and-ontario>; and,
- (c) Comprehensive Economic and Trade Agreement at <https://www.international.gc.ca/trade-commerce/trade-agreements-accords-commerciaux/agr-acc/ceta-aecg/index.aspx?lang=eng>.

#### **4.6.13 Governing Law**

The terms and conditions in this Part 4:

- (a) Are included for greater certainty and are intended to be interpreted broadly and separately (with no particular provision intended to limit the scope of any other provision);
- (b) Are non-exhaustive (and shall not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations); and,
- (c) Are to be governed by and construed in accordance with the laws of the province or territory within which the Customer is located and the federal laws of Canada applicable therein.

[End of Part 4]

## **APPENDIX A – FORM OF MASTER AGREEMENT**

This Appendix is posted as a separate PDF document.

## APPENDIX B – SUPPLIER REPORTING REQUIREMENTS

Once CSAs have been executed, the Supplier must provide the following reports to OECM for the Term. Reports shall be submitted via email in Microsoft Excel format according to the frequency set out below.

<b>Supplier Reporting Requirements</b>		
<b>Sales Reporting</b>	<b>Frequency</b>	<b>Due Date</b>
<p>Sales Reporting including, but not limited to:</p> <p>(a) Customer's name;          (b) Invoice number and date;          (c) Product/Services provided;          (d) Quantity invoiced;          (e) Rate and total Rate; and,          (f) Cost Recovery Fee.</p>	Quarterly	8th Business Day following each Calendar Quarter
<b>Performance Reporting</b>	<b>Frequency</b>	<b>Due Date</b>
<p>(a) Key Performance Indicators ("KPIs") Report - As set out in Appendix C – Supplier Performance Management Scorecard.</p> <p>(b) Performance results specific to Customer's KPIs.</p>	Quarterly (calendar)	8th Business Day following each Calendar Quarter
<b>CSA Reporting</b>	<b>Due Date</b>	
<p>(a) Provide a copy of each fully executed CSA.</p>	Within thirty (30) days of CSA execution	
<b>Other Reporting</b>		
<p>May include:</p> <p>(a) Sales Forecasting Reports:</p> <ul style="list-style-type: none"> <li>i. By November 15 – for the next calendar year;</li> <li>ii. By March 15 – for April to December, if the forecast in (a) above has changed; and,</li> <li>iii. By July 15 – for August to December, if the forecast in (b) above has changed.</li> </ul> <p>(b) Specific Customer Reports, as requested (e.g., purchase orders and invoices).</p> <p>(c) OECM Ad Hoc Reports - As requested and mutually agreed upon.</p>		

Final reporting requirements will be determined during negotiations.

## APPENDIX C – SUPPLIER PERFORMANCE MANAGEMENT SCORECARD

Master Agreement performance means the Supplier aligns with OECM's three (3) pillars of Savings, Choice and Service, supporting the growth of the Master Agreement among Customers, and providing quality products and services at competitive Rates.

Supplier performance means the Supplier meets or exceeds the performance requirements described below and adheres to all the other contractual requirements.

As part of OECM's efforts to provide greater value to Customers, OECM has implemented a Supplier Recognition Program ("SRP"). Through the SRP, OECM will objectively assess Supplier's performance using an open, fair and transparent framework to recognize and reward top-performing suppliers on an annual basis.

To ensure Master Agreement requirements are met, the Supplier's performance will be measured and tracked by OECM to ensure:

- (a) On time delivery of high-quality products and services at the Master Agreement Rates or lower;
- (b) Customer satisfaction;
- (c) On-time Master Agreement activity reporting to OECM;
- (d) On-time Cost Recovery Fee remittance; and,
- (e) Continuous improvement.

Reporting, as described in Appendix B – Supplier Reporting Requirements is mandatory for the Supplier to submit as they provide evidence and justification of adherence to the Master Agreement. Through consolidation of reporting information, OECM provides Customers a thorough understanding of the Supplier's performance aiding the adoption of the Master Agreement.

By providing the reports, OECM is able to analyze and maintain the integrity of the Supplier's performance.

Failure, by the Supplier, to provide accurate reports by the due dates set out in Appendix B – Supplier Reporting Requirements may be deemed poor performance and will reflect on the Supplier's Performance Management Scorecard and SRP results.

During the Term of the Master Agreement, the Supplier shall collect and report the agreed upon results of the performance measures as requested by OECM. The Performance Management Scorecard and other performance indicators will be used to measure the Supplier's performance throughout the Term of the Master Agreement, ensuring Customers receive appropriate Products/Services on time. The Supplier's performance score will be considered when OECM contemplates Master Agreement decisions such as:

- (a) The approval or rejection, in whole or in part, of the Supplier's Rate refresh requests;
- (b) The approval or rejection of the Supplier's request to add other related products and/or services to the Master Agreement;
- (c) Master Agreement extensions; and,
- (d) Master Agreement termination.

The Supplier shall maintain accurate records to facilitate the required performance management reporting requirements related to OECM and Customer KPIs.

During the business review, OECM will review the KPIs with the Supplier. The KPIs include but are not limited to the following:

Supplier Provided Customer Performance Measures		
Key Performance Indicator	Performance Measurement	Performance Goal
Customer Issues – Number of Customer complaints	Total of Customer complaints annually out of total Customer requests	Less than 2% of total Customer requests
On-time service provision	Actual lead time versus lead time agreed upon	Better than or equal to 98% of the time
Quality of Services	Percentage of returns by Customer	Less than 2% of total orders
Accurate Invoicing	Number of Invoicing errors annually	Less than 2% annually

OECM Evaluation of Supplier's Performances		
Key Performance Indicator	Performance Measurement	Performance Goal
On time Sales Report Submissions	On time	98% of the time
On time KPI Report Submissions	On time	98% of the time
On time submission of executed CSAs received within 30 days of execution	On time	98% of the time
On time CRF payment remittance	Day of	98% of the time
Response time to OECM inquiries	One (1) Business Day	98% of the time

Other KPIs, as mutually agreed upon between the Supplier and OECM, may be added during the Term of the Master Agreement.

Customer may, when executing a CSA, seek other KPIs.

#### Penalties and Rewards

The Supplier shall be responsible for all liquidated damages incurred by the Customers as a result of Supplier's failure to perform according to the Master Agreement and/or CSA. Additional penalties for failure to meet or rewards for exceeding the Master Agreement and/or CSA requirements may be mutually agreed upon between the Customer and the Supplier, at the time of CSA execution. Any penalty and/or reward shall be reported to OECM.

## APPENDIX D – OECM'S SUPPLIER CODE OF CONDUCT

The Supplier will take every measure to comply with OECM's Supplier Code of Conduct ("SCC") principles set out below and to adopt behaviours and practices that are in alignment with these principles or those of OECM's Customers as mutually agreed upon between the Customer and Supplier. OECM's core values of collaboration, responsiveness, integrity, innovation and respect are in alignment with and entrenched within the key principles of the SCC. The SCC applies to the Supplier's owners, employees, agents, partners and subcontractors who provide products to OECM and/or Customers.

The Supplier will manage their operations according to the most stringent standards of ethical business, integrity and equity. The Supplier must therefore:

- (a) Refrain from engaging in any form of non-competitive or corrupt practice, including collusion, unethical bidding practices, extortion, bribery and fraud;
- (b) Ensure that responsible business practices are used, including ensuring that business continuity and disaster recovery plans are developed, maintained and tested in accordance with applicable regulatory, contractual and service level requirements, and that healthy and safe workplaces that comply with relevant health and safety laws are provided;
- (c) Ensure the protection of the confidential and personal information they receive from OECM, and only use this information as part of their business relations with OECM;
- (d) Comply with intellectual property rights relating to the products provided to OECM and its Customers;
- (e) Never place an OECM employee in a situation that could compromise his/her ethical behaviour or integrity or create a conflict of interest;
- (f) Divulge all actual and potential conflicts of interest to OECM; and,
- (g) Disclose to OECM any behaviour deemed unethical on the part of an OECM employee.

Also, the Supplier shall:

- (a) Comply with all foreign and domestic applicable federal/provincial/municipal laws and regulations including, but not limited to the environment, health and safety, labour and employment, human rights and product safety and anti-corruption laws, trade agreements, conventions, standards, and guidelines, where the products or services are provided to OECM Customers. Fair competition is to be practised in accordance with applicable laws. All business activities and commercial decisions that restrict competition or may be deemed to be uncompetitive are to be avoided;
- (b) Not try to gain improper advantage or engage in preferential treatment with OECM employees and Customers. The Supplier must avoid situations that may adversely influence their business relationship with OECM or can be directly or indirectly perceived as a conflict of interest and interfere with the provision of the products to OECM or its Customers. The Supplier must disclose any actual or potential conflicts of interest promptly to OECM;
- (c) Never offer to OECM staff bribes, payments, gifts of entertainment or any type of transactions, inducements, services, discounts and/or benefits that may compromise or appear to compromise an OECM's employees' ability to make business decisions in the best interest of OECM and its Customers. If a Supplier is unsure whether a gift or entertainment offer to an OECM employee complies with OECM's SCC, the Supplier should consult with the intended recipient's manager;
- (d) Not engage in any improper conduct to gain influence or competitive advantage especially that which would put OECM or its Customers at risk of violating anti-bribery and/or anti-corruption laws. The Supplier must ensure that the requirements of all these applicable laws are met, and not engage in any form of corrupt practices including extortion, fraud or bribery;
- (e) Ensure that any outsourcing and/or subcontracting used to fulfill products are identified and approved by the Customer and monitored to ensure compliancy with contractual obligations and adherence to OECM's SCC. Supplier's employees, subcontractors and other service providers must adhere to the requirements of the SCC, which must be made available as necessary. The Supplier must also ensure that its subcontractors and other

service providers are paid properly and promptly to avoid any disruption in the provision of products by the Supplier to OECM or its Customers;

- (f) Maintain workplace professionalism and respect for the dignity of all employees, Customers, and individuals. The Supplier must never exercise, tolerate or condone harassment, discrimination, violence, retaliation and any other inappropriate behaviour;
- (g) Abide by applicable employment standards, labour, non-discrimination and human rights legislation. Where laws do not prohibit discrimination, or where they allow for differential treatment, the expectation of the Supplier is to be committed to non-discrimination principles and not to operate in an unfair manner. The Supplier must be able to demonstrate that their workplaces operate under the following principles:
  - i. Child labour is not accepted;
  - ii. Discrimination and harassment are prohibited, including discrimination or harassment based on any characteristic protected by law;
  - iii. Employees are free to raise concerns and speak up without fear of reprisal;
  - iv. Appropriate and reasonable background screenings, including investigations for prior criminal activity, have been completed to ensure integrity and character of the Supplier's employees; and,
  - v. Clear and uniformly applied employment standards are used that meet or exceed legal and regulatory requirements;
- (h) Provide healthy and safe workplaces for their employees. These workplaces must comply with applicable health and safety laws, statutes and regulations to ensure a safe and healthy work environment. Employers must also ensure that their employees are properly trained and that they have easy access to information and instructions pertaining to health and safety practices; and,
- (i) Give high priority to environmental issues and implement initiatives to foster sound environmental management through practices that prevent pollution and preserve resources. The Supplier must conduct business in an environmentally responsible and sustainable manner. The Supplier must comply with all applicable environmental laws, statutes and regulations, including, but not limited to, waste disposal (proper handling of toxic and hazardous waste), air emissions and pollution, to ensure that they meet all legal requirements and strive to prevent or mitigate adverse effects on the environment with a long-term objective of continual improvement.

The Supplier is expected to:

- (a) Abide by OECM's SCC;
- (b) Report violations of the SCC or identify any Customer requests that might constitute violations; and,
- (c) Cooperate and collaborate with OECM and bring about the resolution of SCC compliance issues.

Compliance with SCC principles is a criterion that is taken into consideration in OECM's supplier selection process and ongoing performance and relationship management.

The practices adopted by the Supplier must be verifiable. Such verification may be conducted by way of a Supplier's self-evaluation and/or an audit completed by OECM at its discretion. The Supplier must provide, upon request, OECM with documents attesting to their compliance with the SCC.

In addition, OECM may elect to visit the Suppliers' facilities if OECM so chooses. Appropriate notice will be provided to the Supplier. Whenever a situation of non-compliance is identified, OECM will endeavor to work with the Supplier in order to develop a corrective plan to resolve the non-compliant issues in a timely manner.

Failure to comply with OECM's SCC may result in termination of this Master Agreement.

For more information, visit OECM's website at <https://oecm.ca/oecm-advantage/our-Supplier-partners/Supplier-code-of-conduct>.

## APPENDIX E – OECM SCHOOL BOARD, COLLEGE AND UNIVERSITY CUSTOMERS IN ONTARIO

Zones	School Board Customers			College Customers	University Customers
Central	Brant Haldimand Norfolk Catholic District School Board ("CDSB")	Hastings and Prince Edward DSB	Waterloo Region DSB	Centennial College of Applied Arts and Technology ("CAAT")	Brock University
	Conseil scolaire catholique MonAvenir	Kawartha Pine Ridge DSB	Wellington CDSB	Conestoga College Institute of Technology and Advanced Learning	McMaster University
	Conseil scolaire Viamonde	Niagara CDSB	York CDSB	Durham CAAT	OCAD University
	District School Board ("DSB") of Niagara	Peel DSB	York Region DSB	Fleming CAAT	Toronto Metropolitan University
	Dufferin-Peel CDSB	Peterborough Victoria Northumberland and Clarington CDSB		George Brown CAAT	Trent University
	Durham CDSB	Simcoe County DSB		Georgian CAAT	Université de l'Ontario français
	Durham DSB	Simcoe Muskoka CDSB		Humber College Institute of Technology and Advanced Learning	University of Guelph
	Grand Erie DSB	Toronto CDSB		Loyalist CAAT	University of Ontario Institute of Technology
	Halton CDSB	Toronto DSB		Mohawk CAAT	University of Toronto
	Halton DSB	Trillium Lakelands DSB		Niagara CAAT	University of Waterloo
	Hamilton-Wentworth CDSB	Upper Grand DSB		Seneca CAAT	Wilfrid Laurier University
	Hamilton-Wentworth DSB	Waterloo CDSB		Sheridan College Institute of Technology and Advanced Learning	
East	Algonquin and Lakeshore CDSB	Conseil scolaire de district catholique ("CSDC") de l'Est Ontarioien	Renfrew County CDSB	Algonquin CAAT	Carleton University
	CDSB of Eastern Ontario	Limestone DSB	Renfrew County DSB	Canadore CAAT	Queen's University
	Conseil des écoles catholiques du Centre-Est	Ottawa CDSB	Upper Canada DSB	La Cité collégiale	University of Ottawa
	Conseil des écoles publiques de l'Est de l'Ontario	Ottawa-Carleton DSB		St. Lawrence CAAT	
North East	Algoma DSB	Conseil scolaire public du Nord-Est de l'Ontario	Northeastern CDSB	Cambrian CAAT	Algoma University
	Conseil scolaire catholique de district des Grandes Rivières	DSB Ontario North East	Rainbow DSB	Collège Boréal	Laurentian University
	Conseil scolaire catholique du Nouvel-Ontario	Huron-Superior CDSB	Sudbury CDSB	Northern CAAT	Nipissing University
	Conseil scolaire catholique Franco-Nord	Near North DSB		Sault CAAT	
	Conseil scolaire public du Grand Nord de l'Ontario	Nipissing-Parry Sound CDSB			
North West	CSDC des Aurores Boréales	Lakehead DSB	Superior North CDSB	Confederation CAAT	Lakehead University
	Keewatin-Patricia DSB	Northwest CDSB	Superior-Greenstone DSB		
	Kenora CDSB	Rainy River DSB	Thunder Bay CDSB		
West	Avon Maitland DSB	Greater Essex County DSB	St. Clair CDSB	Fanshawe CAAT	University of Windsor
	Bluewater DSB	Huron-Perth CDSB	Thames Valley DSB	Lambton CAAT	University of Western Ontario
	Bruce-Grey CDSB	Lambton Kent DSB	Windsor-Essex CDSB	St. Clair CAAT	
	Conseil scolaire catholique Providence	London District Catholic School Board			

## APPENDIX F – ONTARIO COUNTY, DISTRICT, REGION, AND SINGLE-TIER LOCATIONS

OECM Customers, in Ontario, are located in County, District, Region, or Single-Tier locations.

<b>Counties</b>	<b>Districts</b>	<b>Regions</b>	<b>Single-Tier</b>
Bruce	Algoma	Durham	Brant
Dufferin	Cochrane	Halton	Chatham-Kent
Elgin	Kenora	Niagara	Haldimand
Essex	Manitoulin	Peel	Hamilton
Frontenac	Muskoka	Waterloo	Kawartha Lakes
Grey	Nipissing District	York	Norfolk
Haliburton	Parry Sound		Ottawa
Hastings	Rainy River		Prince Edward
Huron	Sudbury		Toronto
Lambton	Thunder Bay		
Lanark	Timiskaming		
Leeds and Grenville			
Lennox and Addington			
Middlesex			
Northumberland			
Oxford			
Perth			
Peterborough			
Prescott and Russell, United Counties			
Renfrew			
Simcoe			
Stormont, Dundas, and Glengarry			
Wellington			
<a href="https://www.amo.on.ca/about-us/municipal-101/ontario-municipalities">https://www.amo.on.ca/about-us/municipal-101/ontario-municipalities</a>			

## APPENDIX G – OEM AUTHORIZED RESELLER LETTER

This Appendix must be completed, signed, dated and uploaded into OTP with a Proponent's Proposal if the Proponent is not the OEM of the proposed Products and Services. Therefore, if the Proponent is the OEM of the proposed Product/Services, the Proponent is not required to complete and submit this authorization, but all other Proponents are.

**To:** **OECM and the Proponent**

**Proponent's Name:** \_\_\_\_\_

**OEM's Name:** \_\_\_\_\_

**Re:** **Proponent's Proposal in response to OECM's RFSQ #2025-492**

The OEM agrees and confirms that:

- (a) The named Proponent is an Authorized Reseller of the proposed OEM Products and Services;
- (b) The Proponent will be eligible and authorized to fulfill the requirements to market, advertise, sell, distribute, install, warrant and maintain the Products and Services from the OEM;
- (c) The OEM warranty period is for a minimum of twenty (20) years for all frame and major structural components and non-structural components shall be a minimum of ten (10) years from the date of completion and acceptance by the Customer; and,
- (d) The Proponent has maintained its status as an Authorized Reseller in good standing with the OEM for at least the past two (2) years.

This Appendix must be signed by an authorized representative from the OEM and submitted with the Proponent's Proposal.

OECM will contact the OEM to validate information on this Appendix during Stage I – Review of Qualification Response (Pass/Fail). Refer to Section 3.2.

Products and Services OEM Name \_\_\_\_\_

OEM's Representative's Name \_\_\_\_\_

*I have authority to bind the OEM*

OEM's Representative's Title \_\_\_\_\_

OEM's Representative's Telephone Number \_\_\_\_\_

OEM's Representative's Email Number \_\_\_\_\_

Date \_\_\_\_\_