



Conseil des arts  
du Canada

Canada Council  
for the Arts

## **Canada Council for the Arts**

**Standing Offer:  
Analysis of CADAC data and disciplinary report writing services**

**De l'art plein la vie  
Bringing the arts to life**

## Standing Offer:

### Analysis of CADAC data and sector-wide and disciplinary report writing services

#### General Provisions

The purpose of this Standing Offer is to add suppliers to the existing list of prequalified suppliers the Canada Council can call upon to obtain **analysis of CADAC<sup>1</sup> data and disciplinary report writing services** (in French or in English).

A Standing Offer Agreement is an arrangement to provide goods and services at prearranged prices with set terms and conditions, for specific periods of time on an “as requested” basis. A Standing Offer is not a Contract and an Order against a Standing Offer is a “Call-up”. Each Call-up is a separate Contract between the Council and the prequalified supplier.

Public corporations, small businesses and independent professionals (freelancers) offering the above-mentioned services may apply for inclusion on this list.

#### About the Canada Council for the Arts

The Canada Council is a federal crown corporation created by an Act of Parliament in 1957 to “foster and promote the study and enjoyment of, and the production of works in, the arts.” The Canada Council offers a broad range of grants, services and prizes to professional Canadian artists and arts organizations ([www.canadacouncil.ca](http://www.canadacouncil.ca)). The Canada Council is also responsible for the operation of the Art Bank, the Canadian Commission for UNESCO and the Public Lending Right Commission.

#### Context: CADAC data analysis and disciplinary report writing for the Canada Council for the Arts

The Canada Council produces numerous and varied research documents each year. Through its Research, Evaluation and Performance Measurement Section, the Council

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<sup>1</sup> CADAC (Canadian Arts Data/Données sur les arts au Canada) is a web based application dedicated to the collection, dissemination and analysis of financial and statistical information about Canadian arts organizations. CADAC launched in 2008 and has been in development since 2004.

A joint effort of arts funders across the country, CADAC provides a simplified process for arts organizations applying for operating grants. Arts organizations making application to multiple funding agencies submit their financial and statistical information in a single format, to a single source. They have access to their own historical data and to reports both on their own organizations and comparisons to all similar organizations in the database.

CADAC currently collects data from more than 925 Canada Council funded organizations across all arts disciplines.

produces a series of reports that use statistical and financial data reported in the [CADAC system](#) by Canadian arts organizations applying for recurring funding.

These CADAC reports are currently produced and published individually per discipline and serve to detect trends and to measure the health and vitality of a specific discipline and organization type across a range of output and outcome areas. Examples of these CADAC reports can be found in the Council's [Research Library](#).

### **Languages**

This standing offer concerns writing reports in French or English.

## INFORMATION FOR SUPPLIERS

### Submission of proposals

Suppliers must submit their proposals no later than **June 29, 2018, at 5 p.m. (EST)** (Ottawa local time), by email (mentioning the Standing Offer in the subject line).

Any questions regarding this SO shall be submitted in writing, via email, and the Council will respond accordingly. Deadline for submitting questions is **June 15, 2018 at 12:00 pm EST** (Ottawa local time). To ensure that all firms receive equivalent information, the Council will post applicable clarification questions and responses on MERX.

### For any information and questions about the Standing Offer:

Gabriel Zamfir-Enache

Manager, Data Intelligence and Performance Measurement

Canada Council for the Arts

Gabriel.Zamfir-Enache@canadacouncil.ca

### Form of Proposal

To ensure that all proposals are uniformly evaluated, they shall be submitted in the format prescribed in **Appendix 2. Your proposal must be no longer than 3 pages and must include the information requested in Appendices 1 and 2.**

All proposals must be signed by a duly authorized officer and include a statement that the supplier has examined and understood the SO and accepts the conditions contained therein.

The proposal must state that the supplier has the technical and financial resources and personnel to provide the services as identified in this standing offer, and within the timeframes specified in this proposal.

### Acceptance or Rejection of Proposals

The Council reserves the right to reject any or all proposals or to accept any proposal at its discretion.

Proposals will not be read prior to the specified closing date and time. Any proposals received after the specified closing date will be discarded.

### Modification or Withdrawal of the Request for Proposals

Suppliers may modify their proposal up to the closing date of the competition, as specified.

Any correction or clarification relating to the request for proposals will be published in the form of an addendum and sent to all concerned suppliers. No interpretation, correction, clarification or modification to the request presented in any form other than

an addendum shall engage the Council. Suppliers must acknowledge receipt of all addenda in their proposals.

### **Period of Validity of Proposal**

Proposals submitted must remain open for acceptance by the Council for a period of not less than sixty (60) days from the specified closing date.

### **Period Covered by the Standing Offer**

This Standing Offer will begin on July 1, 2018 and end on June 30, 2020, with the option to renew for two (2) additional periods of one (1) year.

### **Confidentiality and Council's Obligation**

All data and information provided to the supplier, including the SO shall remain the exclusive property of the Council. As such, all data and information shall be kept strictly confidential and shall not be disclosed to any third party or reused without the express written consent of the Council.

Furthermore, the copyright of all CADAC reports produced, including their corresponding data, texts, tables, charts and calculations shall be property of the Canada Council, and the supplier will have no right to reuse them.

The issuance of this SO and Council's receipt of any proposal shall not, in any manner, obligate Council to perform any act, incur any liabilities, or reimburse or compensate any Supplier for preparation costs or other losses incurred in the preparation of their response to this SO. The Council shall have the right to use, for any purpose, any information submitted in connection with the SO unless it has been marked Confidential.

### **Evaluation of Proposals**

All proposals will be rated on the basis of a "points earned" matrix that will involve an analysis of the complete proposal including, but not limited to, such areas as:

- pricing
- ability to provide a highly personalized, responsive, quick and practical service
- education and years of experience in the services proposed and in working in a cultural or arts context
- references and quality of examples of documents submitted

Selected suppliers will need to take a mandatory assessment test of Excel skills.

### **Extent of the obligations of the Canada Council for the Arts**

This invitation to submit a proposal as supplier and the Council's receipt of that submission in no way obliges the Council to offer work to a supplier, nor does it entitle the supplier to receive work from the Council.

The Council retains full decision-making authority regarding proposals that respond to the requirements laid out in the standing offer and regarding evidence demonstrating the respect of these requirements. As well, the Council reserves the right, at its sole discretion:

- to suspend the standing offer at any time;
- to negotiate with none of the suppliers who have submitted proposals;
- to ask, orally or in writing, for clarifications regarding any additional information concerning proposals judged to be adapted to its needs.

## REQUIREMENTS OF THE CANADA COUNCIL

### **Quality of work, response time and respect for deadlines**

It is expected that all suppliers offering CADAC data analysis and disciplinary report writing services to the Canada Council will provide these services in a timely manner, with the highest possible level of accuracy. To this end, suppliers are expected to verify the quality of their own work before delivering the finished product to the Canada Council. The Council may choose to refuse a job or ask for compensation if the work is considered to be poor quality (incomplete; numerous typographical, grammatical, syntax, calculation, or analytical errors; work that requires extensive revision by the Council).

Suppliers must provide quality assurance for their own work – **they must review the data and texts before submitting the completed work to the Canada Council.**

Requests for reports and projects will be sent to suppliers by email and suppliers are expected to accept or refuse by email any request from the Council **within the 24 hours following the request** (normal hours of work). Once a job is accepted, the supplier must respect the required deadline.

### **Technical, Operational and Organizational Environment**

Suppliers must be able to share electronic documents in Microsoft Word or Microsoft Excel or other MS Office formats.

### **Location of Work Site and Delivery**

Suppliers are expected to work from their own locations and communicate with the Canada Council by phone and/or by email. All completed work is to be delivered to the Canada Council in electronic format via email or electronic file transfer.

### **Writing and Editing Assistance**

The Canada Council provides suppliers of CADAC report writing services with a lexicon of Canada Council terminology. Suppliers are expected to make use of this lexicon when performing any work for the Canada Council in an effort to ensure consistency of

language throughout all Canada Council documents. Suppliers may also access the Canada Council web site for reference purposes or consult Communications Content staff directly. Nevertheless, it is expected that the suppliers have a strong knowledge and experience with statistical and financial terminology.

### **Confidentiality**

The supplier must ensure the confidentiality of all data, files, and texts assigned to them.

### **Rush Work**

From time to time, the supplier may be asked to respond to urgent or “rush” call-ups. If the supplier accepts such work, it shall be invoiced at the rush rates specified in the Supplier’s *Rates and Services Grid* submitted in response to this SO Agreement.

### **Special Requirements**

The Canada Council will describe any special requirements of the work on the request for service. Suppliers must seek approval for any surcharges or additional costs (above and beyond those identified in the *Rates and Services Grid*) prior to commencing work on any such request. Suppliers must also notify Communications Content staff if they expects any delays or upsets due to the special requirements.

## **TASKS, ACTIVITIES, DELIVERABLES**

### **Main tasks and activities**

The main tasks and activities involved in the production of the CADAC disciplinary reports are:

- Database analysis using Microsoft Excel or similar analytical tools.
- Statistical description of the data, exploring relations between variables and trends.
- Explanation of the behavior of such variables (growth rates, trends, forecasts, etc.) according to the particular current situation of each CADAC organization and the artistic discipline in general.
- Production (writing) of approximately a 25 page document that includes the results obtained from the analysis, and all the necessary charts and tables. This document should contain an introduction, methodology, analysis of financial, economic and statistical data, summaries, end notes, and appendixes.
- Create a report cover and factsheet summary in Adobe InDesign.
- Validation of data and descriptive texts.

### **Deliverables:**

- Report in Word format in one of the official languages (English or French).
- Excel spreadsheet with all the tables and calculations used to produce the document (for validation among REPM staff).
  - All tables and charts in editable formats.
- Cover page and factsheet summary.

### **Requests for Service or Requests Subsequent to the Standing Offer**

The Canada Council shall provide the supplier with the necessary data and information (by email, USB key, Dropbox and/or other data sharing tools), including the documentation and information required for the work, delivery dates and a description of the work, to permit the supplier to determine whether it can accept and process the work requested within the deadlines specified by the Canada Council.

### **Supplier's Invoice**

The Supplier must supply a detailed invoice for the work completed (based on the *Rates and Services Grid* provided as part of its application to be included on the list of pre-qualified suppliers). The Canada Council typically pays invoices within 30 days of receipt of the invoice.

Invoices must be submitted by email as follows:

Bethsy Lezama  
Research, Evaluation and Performance Measurement  
Canada Council for the Arts  
[bethsy.lezama@canadacouncil.ca](mailto:bethsy.lezama@canadacouncil.ca);

## APPENDIX 1

### Rates and Services

This Rates and Services Grid must be completed by the supplier as part of its application to be included on the list of pre-qualified suppliers.

Rates remain in effect until June 30th, 2020.

<b>Services</b>	
	Total Rate (\$)
Disciplinary CADAC Report	

## APPENDIX 2

### Proposal Format

#### **Part A Summary of Proposal**

#### **Part B *Supplier Information***

The following information must be provided with the supplier's application to be considered for inclusion in the Canada Council list of pre-qualified suppliers:

- a) Information about the supplier's business status: nature of the business (e.g., incorporated, partnership, self-employed), business number and GST number;
- b) Contact information (including web site and email addresses);
- c) Years of experience and/or date of incorporation;
- d) List of current clients in the arts and culture sector, as well as references or testimonials from two clients;
- e) Names and years of related experience of key staff; status of employees and names of analysts who will be assigned to the Council;
- f) Description of the supplier's proficiency in data analysis, competency in analytical thinking, data processing, data visualizations, financial and statistical analysis, and performance indicators, among others.
- g) List of tasks that the supplier is able to perform in Microsoft Excel, and that demonstrate an advanced level of competence. These should include at a minimum, the following:
  - a. Use of advanced functions (for example: INDEX MATCH, VLOOKUP, COUNTIF, SUMIF, CONCATENATE).
  - b. Use of Pivot Tables.
  - c. Use of Custom Sorting, Filters and Subtotals.
  - d. Proficiency with different types of charts including different series of data in different axes)
  - e. Data analysis tab functions (including regression analyses).
  - f. Conditional Formatting.
  - g. Basic VBA coding.
- h) Writing and editing capacity.
- i) A brief description of the supplier (60 words);
- j) Examples of work: the supplier must provide an example of analytical data work containing statistical and financial indicators, and that is considered to be representative of the type of work and quality that it typically produces;
- k) Quality assurance statement: The supplier must provide a description of how it ensures the quality and accuracy of its work (40 words maximum);
- l) The *Rates and Services Grid* (see Appendix 1) duly completed.

**Part C****Suitability of Supplier**

In this section, the supplier should explain in one paragraph (70 words) the reasons for which it feels it is best suited to respond to the Council's needs in CADAC data analysis and disciplinary report writing services.