



Friday February 20th, 2017

Proposal # 9642

SENT VIA E-MAIL TO:
eaminkova@cctcc.ca

Elena Aminkova
The Canadian Clinical Trials Coordinating Centre
116 Albert Street, Suite 500
Ottawa, ON
K1P 5G3

RE: Strategic and Organizational Planning Consultation for the Canadian Clinical Trials Coordinating Centre

Dear Elena,

In follow up to last week's phone conversation, I am happy to deliver our proposal for consulting and facilitation services in support of your strategic and organizational planning needs anticipated for May 2017 in Toronto, Ontario.

Attached you will find a summary of our understanding of the project requirement, the proposed approach and prospective solutions to address the requirement and professional fees for the services. Included are additional service options that may alternatively suit your organization's needs.

In summary, we are proposing to engage stakeholders through an online survey using a virtual delivery method to formulate important dialogue among a broad range of participants, the results of which will serve as a key input for the one-day strategic planning meeting expected for May.

On behalf of Intersol, I would like to extend sincere gratitude for the invitation to submit a proposal and I thank you for the opportunity to work with you and the Canadian Clinical Trials Coordinating Centre on this important project.

Regards,

A handwritten signature in black ink, appearing to read 'Marc Valois'.

Marc Valois
Senior Consultant

INTERSOL GROUP LIMITED / GROUPE INTERSOL LTÉE
205, RUE CATHERINE STREET, SUITE 300, OTTAWA, ONTARIO, CANADA K2P 1C3
TEL. / TÉL. : (613) 230-6424 • FAX / TÉLÉC. : (613) 567-1504 • WWW.INTER SOL.CA

Table of Contents

1	OUR UNDERSTANDING OF YOUR REQUIREMENTS	3
2	EXPERIENCE AND QUALIFICATIONS	3
3	PROJECT DESCRIPTION SUMMARY	4
4	PROPOSED SOLUTIONS	5
4.1	Phase 1: Preparation and Design	5
4.2	Phase 2: Facilitation of the Strategic Planning Meeting	7
4.3	Phase 3: Final Report Preparation	8
4.4	Logistics and Project Support.....	8
4.5	Timelines	8
5	PROPOSED RESOURCES.....	9
5.1	Marc Valois, Senior Consultant, Facilitator, Project Lead.....	9
5.2	Frank Van Gool, Senior Consultant, Project Resource.....	10
5.3	Sue Perron, Report Writer, Project Support	10
6	ABOUT INTERSOL.....	11
6.1	Who We Are.....	11
6.2	Our Expertise.....	11
7	PROFESSIONAL FEES	12
7.1	Professional Fees	12
7.2	Travel Cost Estimates.....	12
7.3	Payment and Contract Terms	12

STATEMENT OF CONFIDENTIALITY

The information in the proposal for consulting services contained herein is INTERSOL confidential. It is intended solely for the purpose of evaluating our response to your Request for Proposal. Reading, copying, disclosing, appropriating or disseminating the contents of this transmission by anyone other than the named recipient is strictly prohibited without the express written permission of Intersol Group Ltd.

Intersol Group Ltd. is aware of the contents of the Canadian Access to Information Act and current regulations governing disclosure of information. It is our opinion that this entire response falls under Article 20(1) of the Act "Third Party Information", subsections (a), (b), (c) and (d) and as such the Crown shall refuse to disclose any information contained in this Response.

Validity of Cost and Services

This proposal and all pricing will be valid for a period of 60 days.

Intent of the Proposal

The following proposed approach has been suggested based on Intersol's current understanding of the project requirements. At any time, the parties have the flexibility to alter or vary the services, approach or methods used and the price for services to be performed in the event that a more suitable approach is identified.

Changes to the suggested approach

This proposal contains the most effective and efficient solutions for the CCTCC's requirements as Intersol understands them. After an initial meeting between the CCTCC and Intersol, should an alternative approach be warranted, changes to the scope presented in this proposal will be addressed via the following process: changes required and identified by Intersol or the CCTCC will be documented and presented to the CCTCC. Upon approval to proceed from the CCTCC, Intersol will conduct analysis of the change requested to estimate the effort required and any potential schedule or scope impact. Intersol will work with the CCTCC to review and develop more definitive plans and make final decisions on the project requirements.

Changes to the estimate

During the course of new project steps, it is possible that the price estimate will need to be revised for any additional unplanned tasks. Intersol will discuss revisions with the CCTCC to approve the implementation of the change in advance and agree on an appropriate course of action. Pricing for updated services will be determined based on discussion and agreement with the client on the scope of work.

1 Our Understanding of Your Requirements

The Canadian Clinical Trial Coordinating Centre (CCTCC) was established in 2014 to advance the need to promote Canada as a desired destination for clinical trial investment and as part of the recommendations from the 2011 Clinical Trials Summit. The CCTCC has since served a three year mandate that aimed to strengthen clinical trials for Canadians and carry out several initiatives contributing to the evolution of clinical trials in Canada. The funding for the CCTCC has been renewed for one year and the mandate will need to be re-examined while the future role of the organization will equally need to be redefined.

The CCTCC is organizing a strategic consultation meeting in May 2017, in Toronto, Ontario. It is expected that approximately 20-30 key internal and external stakeholders will be invited to participate. The purpose of the strategic planning meeting is to determine the future strategic direction and the governance structure of the CCTCC. The CCTCC also envisions a pre-engagement survey to be broadly circulated to all relevant stakeholders in the Canadian clinical trial field prior to the strategic planning meeting. This will allow stakeholders to be in a highly informed position in order to draw inspiration and establish the organization's future strategic direction, goals and governing framework.

The CCTCC is looking for the services of experienced and professional facilitators to assist with the pre-engagement survey, the planning and design of the strategic consultation, and to facilitate the meeting within a modest time period. In response, the Intersol Group are declared experts in strategic planning and are fully committed to listening and guiding you through the development of a plan with respect to your desired timeframe. It's our mission to ensure you are confident and successful in the next steps your organization not only establishes, but also executes.

2 Experience and Qualifications

2.1 Intersol Group: Our Unique Value Proposition

Intersol is uniquely suited to support the CCTCC in its efforts to involve stakeholders and develop its future strategy. The Intersol Group is Canada's largest and most established facilitation-focused strategy firm, headquartered in Ottawa, Ontario and having offices in Toronto, Montreal and San Francisco. We have completed over 9,000 consultation projects worldwide and have led hundreds of strategic consultations on industry and sector-level strategies with stakeholders similar to the CCTCC strategy.

Roundtable Facilitation

Our core competency and unique offering is our expert ability in facilitating meaningful discussions with organizational stakeholders that lead to tangible results for clients. We incorporate varying models of change management, decision making, adult learning, negotiation and strategic planning into our process designs and we professionally lead these discussions to achieve the established objectives. Each of our resources is professionally certified and holds active standing with the International Association of Facilitators. Our senior resources have at least 25 years of experience as full time practitioners of large group consultation in designing and leading strategic planning efforts. Our resources are sought after as speakers at consultation and strategy conferences, and serve as expert advisors to governments in the development of their stakeholder consultation policies and practices. This experience comes from

having worked with many sector level strategies and leading efforts with stakeholders and decision makers at all levels. These include Ministers, senior government officials, academics, industry leaders, subject matter experts, boards of directors, senior management teams, front line workers and Canadian, Ontario and municipal citizens.

Web-Based Dialogue

Since the advent of web 2.0 in 2006 and the emergence of web interactivity and 2-way dialogue, Intersol has been investing in web-based technologies that enable stakeholders to discuss and collaborate on key topics of shared interest. Intersol has strategic partnerships with several dialogue platforms depending on client need and flexibility. In addition to the standard meeting, survey and webinar software platforms available, Intersol also utilizes more capable and interactive real-time and asynchronous consultation technologies such as electronic flipcharts, crowd sourcing, ideation and interactive research discussion forums that are able to incorporate video, graphics and data tagging on complex issues. Intersol has extensive experience in the design and moderation of web-based surveys and webinars such as the CCTCC is seeking, however, would be pleased to discuss the opportunity to utilize other advanced feature rich technologies which could enhance the stakeholder consultation experience and quality of data received by CCTCC.

3 Project Description Summary

Intersol will begin with a pre-engagement survey to ensure that the direction of the organization is strongly influenced by key stakeholders, while cultivating the ideas and topics that will lay the foundation for the 1-day face-to-face strategic planning meeting. Intersol proposes a unique approach using a combination of leading edge, online tools and in-person dialogues. The web-based tools enable strategic input and discussion among key CCTCC stakeholders that support the planning session. The online engagement tool outlined in this proposal is a cost-effective and efficient way to enable meaningful participation across multiple networks, in a short amount of time and at a low relative cost.

Next, Intersol will work with the CCTCC to design a 1-day strategic planning session that uses the results of the online pre-engagement discussion to ultimately set a clear direction for the organization. Intersol will integrate results and feedback from the stakeholder consultations into the face-to-face strategic planning meeting in ways that make the data meaningful, and that enables the articulation of strategic outcomes for the organization.

Finally, Intersol will summarize the strategic planning process and the results from both the online engagement and the face-to-face planning meeting in a report formulated as the CCTCC's strategic plan. The document will be provided to the CCTCC to circulate at their discretion.

4 Proposed Solutions

Of the Intersol Group, Marc Valois will be the primary point of contact and will be in regular communications with the CCTCC's primary contact for the duration of the project. Our solutions follow an evidence-based methodology that can be tailored to the CCTCC's needs. Below is a breakdown of what to expect.

4.1 Phase 1: Preparation and Design

Kick-off Meeting and Scoping

Intersol will review background material, including current CCTCC Action Plan, as well as more recent information gathering work done by the CCTCC. Following this review, the consultant will meet with representatives of the CCTCC to ensure Intersol has a clear understanding of the current context, to clarify the objectives of the engagement, and to solicit views, input and expectations with regard to the project and deliverables.

An integral part of Phase I of the planning process will be the discussion of typical types of risks associated with such an initiative. The most common types of risk are *planning risks*, which include delays in identifying and confirming interviewees, stakeholder or sectorial commitment and participation, adequacy of resources, methods and ease of mechanism to engage participants, etc. as well as *design risks* such as unclear objectives, and goals for the consultation sessions. All too common **is the tendency for stakeholders to work in silos**, posing a threat to collaborative needs. Most of these risks can be addressed through the planning process and by the design. Consequently, Intersol Group utilizes and communicates good contingency planning to its clients in order to maintain focus on the desired outcomes and elicit discussion from those who may otherwise continue to work in isolation.

Environmental Analysis and Stakeholder Engagement

The first step is to collect additional and relevant information about the CCTCC's environment in order to extract trends, realities and challenges. This is done by engaging major internal and external stakeholders via an **online pre-engagement survey**. It is estimated that this step will engage **approximately 50 stakeholders**. This could include members of the Executive Committee and the National Advisory Group, as well as other significant influencers. Pertinent trends are assembled and presented to the select stakeholder group that will be invited to participate in the May Strategic Planning Meeting.

A valid environmental scan provides insight into the challenges and opportunities that the CCTCC will need to consider and contrast them with the key strengths and weaknesses of the organization.

Engaging participants in the environmental scanning beforehand will have two significant benefits. First, a broader range and number of participants will be able to participate in the strategic planning; **creating higher quality results and greater alignment** and to better support informed decision making on the organization's future strategic priorities, and second, significant time can be saved at the meeting by doing much of the data sharing work beforehand. As a result, the meeting can be reduced to one day rather than the traditional two, saving costs on consulting fees, time, accommodation and travel for the second day.

Guiding Elements – The organization's three year mandate has been completed and the final year of funding will be used to determine the CCTCC's next steps.

Methodology

The Intersol Group is proposing the use of an online tool to engage the CCTCC stakeholders by establishing a dialogue that will be **virtually and professionally facilitated** using an electronic flipchart.

Intersol utilizes the web-based platform, “Facilitate Pro” to facilitate online environmental scan discussions. Facilitate Pro is the online equivalent of the traditional, paper-based flipchart; instead allowing participants to brainstorm and share ideas posted onto an *electronic* flipchart. The platform can also be used as a decision support tool to poll participants to establish priorities. The platform allows individuals and groups – located in the same room or in a different room and time zone – to actively contribute to the event, meeting or workshop. This can be done synchronously – for example, when participants in different places are contributing to a discussion at the same time, or it can be done asynchronously – when participants contribute to a discussion over the course of days or weeks. This web-based discussion platform is located on a secure server in Canada and is password enabled.

To set up and enable these online discussions, Intersol works with clients to select the participants and design invitations with appropriate background information packages. Each online engagement is custom designed to meet the organization’s specific requirements using different discussion modules to meet different needs. The online engagement itself can include multiple rounds of feedback and often includes a knowledge exchange between participants to build a shared understanding of strategic issues.

Notes captured through the online discussion will be collated and synthesized into a report detailing the key findings of each data gathering activity and nature of discussions. This report will benefit and drive the in-person strategic planning meeting.

Additional Service Option

Organizations differ in their need to reach out to their stakeholder communities and involve them in their strategic planning efforts. Data for the environmental scan can be collected using different methods such as stakeholder in-person or telephone interviews, industry reports and evaluations. The following activity can be offered as an additional method for stakeholder engagement and is outside the scope of this proposal. Final decisions on approach and methods are discussed at the Kickoff Meeting. Pricing for optional services will be provided separately based on discussion and agreement with the client on the scope of work.

4.1.1 Additional Service Option A- Multi-Stakeholder Thought Leaders Round Table

This option consists of bringing together a subset of highly representative internal and external leaders as well as other key stakeholder groups in a one-day roundtable format. The purpose of the roundtable would be to review the environmental scan produced from the stakeholder interviews to refine it and to identify the key issues and challenges that should be the focus of the strategic planning meeting. This sub-set of representatives of the larger community of stakeholders would be selected using a community futures approach to identify those individuals who are highly respected and trusted by their peers to best represent their own views. The advantages of using this approach is that it creates a shared understanding of the environmental scan and the range of perspectives that contributed to it. As well, it enables a co-creation approach toward identification of the most important issues to focus on, ensures a high degree of relevancy and provides the necessary data for a solid supporting rationale for any following presentation to the broader group of advisory board members which in turn, increases buy-in for the plan overall. The product of the roundtable would be used to launch the strategic planning meeting.

4.2 Phase 2: Facilitation of the Strategic Planning Meeting

Facilitation Services

Through proven strategic planning methodology, Intersol will follow a series of progressive steps: reviewing the key findings of the environmental scan with attendees; introduction of the agenda items, managing the flow, context, clarity and inclusiveness of the discussions; providing context and challenges as appropriate; capturing key points on flipcharts or other media to keep data visible; bringing agenda items to conclusion and summarizing decisions and next steps; and, in general, facilitating the participants' progression through the strategic planning agenda to meet the objectives of the day.

Approach

The design of the strategic planning meeting may employ a number of methodologies including time spent in plenary deliberations, in facilitated group discussions or in self-organized breakout sessions. During the meeting, the facilitator will adapt the environment to any process changes as necessary. A co-lead and report writer will capture notes during the plenary discussion of the meeting. During break-out sessions (if applicable) the participants will self-document their deliberations using discussion templates that will be provided by Intersol.

Intersol will also prepare any meeting materials, such as worksheets, workbooks, and pre-formatted flipcharts as necessary in order to support the process and capture the results.

Additional Service Option

A second option that may be useful to the CCTCC as part of its strategic planning process would be to establish an operational plan that includes performance measurements and accountabilities. If desired, this could be offered as a separate 1-day meeting at a later date. Pricing for optional services will be provided separately based on discussion and agreement with the client on the scope of work.

4.2.1 Additional Service Option B- Strategy Implementation

Once a formal strategy is created, a proper execution plan should be developed in quick fashion in order to reduce the risk and loss of momentum on how to properly implement the strategy. An entirely new approach should be carefully crafted to appropriately integrate the strategy into the operational phase while ensuring there is consideration of budgeting and performance processes of the organization. The Intersol Group offers support services for the implementation of the strategy that require consultants to work with appropriate CCTCC task holders to assess progress against the plan. A glimpse of a strategy implementation can be viewed as follows:

- **Initial Implementation** *May – June 2017*
Development of Business and workplans, allocation of budgets and performance management framework. Other deliverables to be included as necessary;
- **Strategy Performance Update** *Winter 2017*
Preparation of review of progress made against the plan – involving Intersol Group consultant and representatives and includes updating performance indicators into annual scorecards;
- **Stakeholder or Board Review** *Winter 2018*
Annual review and modifications based on results achieved or changes in the context / environment.
- **Annual Strategy Performance Update and/or Board Review** *Spring 2018*

A strategy performance update and Board Reviews is conducted annually. Intersol consultants would provide consulting support on an as-needed basis to the CCTCC over the planning period in line with the critical path established at the outset of the project.

4.3 Phase 3: Final Report Preparation

The information collected from both the online pre-engagement survey and the 1-day strategic planning meeting will be summarized, outlining key points of discussion and conclusions reached at the meeting. Intersol will produce a written Strategic Plan Report that will include the strategic planning approach taken, the results of the online consultations, and the 1-day planning workshop, identified recommendations, priorities and actions. The report will be prepared in MS Word, in English, unless otherwise specified by the CCTCC. For detailed reporting, a final document can be expected within 10 days. Prior to a contract agreement, a different reporting timeline may be negotiated. If the standard 10-day term is agreed upon, any request to expedite the report will result in additional fees.

4.4 Logistics and Project Support

Intersol will provide weekly updates on the project status and any risks to the project trajectory will be brought to the attention of the CCTCC in order to resolve the issue promptly and continue with minimal impact to project timelines. Intersol will also provide administrative support for booking meetings, managing documentation, printing meeting materials and assuring quality control of the project.

4.5 Timelines

Careful consideration of timelines is a priority and a fundamental part of the project management. There will be two consultants dedicated to this project however additional resources can be called upon in order to complete this project under quicker timelines. The following proposed timelines are based on an estimated start date of March 1, 2017.

Phase I – Preparation and Design Completed by April 30, 2017	Phase II –Facilitation of Strategic Planning Meeting Completed by May 31, 2017	Phase III –Final Report Preparation Completed by June 10, 2017
<p>Kick-off Meeting</p> <ul style="list-style-type: none"> Initiate planning meetings to confirm scope, objectives and desired outcomes. <p>Environmental Analysis</p> <ul style="list-style-type: none"> Develop lines of enquiry for the conduct of the environmental scan; Convert lines of inquiry into a series of survey questions; Administer survey to pre-selected stakeholders; Facilitate online discussions 	<p>Facilitating the meeting and participants’ progression through the agenda to meet the objectives of the day</p> <ul style="list-style-type: none"> introduction of the agenda items; managing the flow, context, clarity and inclusiveness of the discussions; providing context and challenges as appropriate; capturing key points on flipcharts or other media to 	<p>Prepare the drafts and final versions of the CCTCC strategic plan</p> <ul style="list-style-type: none"> Capture the results of the workshops and consultations and format into a first version strategic plan for CCTCC; Meet with the client to review the draft, collect feedback; Update the plan to incorporate the feedback and resubmit to the client for review; Prepare the final draft of the

Phase I – Preparation and Design Completed by April 30, 2017	Phase II –Facilitation of Strategic Planning Meeting Completed by May 31, 2017	Phase III –Final Report Preparation Completed by June 10, 2017
<p>Summary of Findings</p> <ul style="list-style-type: none"> • Collate and analyse the data gathered from all sources; • Prepare the environmental analysis report; • The findings are circulated to necessary CCTCC stakeholders in preparation for the Strategic Planning session. 	<ul style="list-style-type: none"> • keep data visible; • bring agenda items to conclusion and summarizing decisions and next steps. 	<p>CCTCC strategic plan.</p>

5 Proposed Resources

The assignment will be lead by Marc Valois, senior consultant and facilitator. Marc will facilitate the 1-day strategic planning meeting for the CCTCC. Sue Perron will be supporting Marc in this project and will be responsible for the report writing as well as assisting with the online pre-engagement survey. Intersol has also included senior consultant, Frank Van Gool, who brings a depth of knowledge and experience in strategic planning, as an additional resource that can be drawn upon if and as necessary.

5.1 Marc Valois, Senior Consultant, Facilitator, Project Lead



Marc Valois is a Senior Consultant and partner of the Intersol Group. Marc has delivered strategic and business planning, participative public consultation, group facilitation and conflict resolution/mediation services to a number of clients in both the public and private sectors.

Marc has designed and facilitated multi-stakeholder workshops that brought together representation from various perspectives and interests of the population, including consumers, industry representatives, special interest groups, academia, provincial government representatives and others. In all assignments, Marc establishes a climate of respectful dialogue where a group dares to question its own assumptions and establishes high-level goals of excellence as they set out to meet their challenges.

Marc is always prepared to bring a refreshing perspective through the questions he asks and by the advice he provides when working with senior executives who are looking for results. As the proposed project leader and lead facilitator, Marc is an extremely dynamic and effective group “architect”, facilitator and “enabler” for Executive dialogue. Marc has over 20 years of experience, is fluently bilingual, and able to work effectively with teams at all levels in initiating and delivering the skills and processes, ensuring they can achieve high impact organizational outcomes.

5.2 Frank Van Gool, Senior Consultant, Project Resource



Frank Van Gool is a partner and Chairman of the Board at Intersol. Frank is a Certified Management Consultant and Internationally Certified Professional Facilitator.

Frank has significant experience in working with Boards representing various professions and industries and has facilitated many sessions to develop thoughtful and engaging strategies to address challenging future environments.

Frank has developed a high profile reputation for helping organizational leaders address sensitive strategic challenges. Frank invests important time in understanding the particular needs and nuances of client organizations and uses that information to design impactful interventions that lead to successful outcomes. Frank is a tremendous asset to any strategic planning project and will act as a valuable project resource.

5.3 Sue Perron, Report Writer, Project Support



Sue Perron joined Intersol after a successful career in healthcare working as a facilitator in a teaching hospital environment. Sue has worked on a variety of projects that required stakeholder engagement and has led strategic planning initiatives at a divisional level. Sue's most recent experience includes the planning, development, execution and evaluation of a virtual health intervention which forms the base of her expertise for online engagement tasks.

Sue began her career in a behavioural science research department which contributed to her extensive experience coordinating various research studies including program evaluation, observational studies and randomized controlled trials. Due to her experience in the research field, Sue has a deep understanding and appreciation for the administration of clinical trials in Canada ultimately adding a valuable strength when it comes to listening and comprehending discussions at the CCTCC's strategic planning meeting. In addition to report writing, her exposure to the realm of clinical trials offers the comfort and confidence to grasp any dialogue on the topic in order to capture a detailed summary of the proceedings.

6 About Intersol

6.1 Who We Are

Intersol Group Ltd. is a bilingual team of experienced consulting, facilitation and learning professionals whose expertise lies within our ability to harness and build lasting organizational capacity for our clients.

Whether the focus is on shaping vision and strategy, on managing change, on stakeholder consultation, or on high performance teamwork, Intersol helps organizations leverage the knowledge, experience and expertise inherent in their own people. We do this by drawing on Intersol's experience of over 20 years and 9,000 projects in the public, not for profit and private sector organizations across Canada.

6.2 Our Expertise

We have worked at all levels within our clients' organizations, from boards of directors and senior leadership teams to communities of managers and team leaders. Our government projects often involve Premiers, Ministers, Deputy Ministers, Assistant Deputy Ministers as well as stakeholders from the scientific, academic, social and economic sectors.

Intersol has a strong reputation for assisting organizations in meeting their strategic objectives in constantly evolving internal and external business environments. We partner with an organization's leaders to build collaborative solutions to today's complex challenges and opportunities. We help all members of the organization develop the knowledge and skills they need to be effective, healthy contributors towards desired outcomes.

Using processes, methods and tools that engage people to collaborate effectively and efficiently, we work with clients in the following areas:

- **Stakeholder Engagement and Public Involvement.** We help our clients to understand and act on the interests of stakeholders so they can develop effective strategies, policies and decisions. This work includes: policy development, consultation strategy development, public and stakeholder consultation, advisory committees, and online consultation and collaboration.
- **Direction Setting and Organizational Effectiveness.** We help our clients to enhance their organizational performance by setting clear direction and aligning business elements. This work includes: Governance, Strategic and Operational Planning, Change Management and Transition and Organizational Performance Management.
- **Evaluation and Performance Measurement.** Evaluation and Performance Measurement are two critical practices used by today's managers to better understand whether their policies, programs and plans are achieving their intended results without undue consequence. Relevant to the government, not-for-profit and private sectors, our evaluation and performance measurement services range from developing logic models, theories of change and performance measurement strategies, needs assessments, and performance-based plans to small and large-scale evaluations.
- **Individual Effectiveness and Workplace Learning.** We help to develop managers, leaders and staff for stronger team performance that translates directly into organizational results. This includes

providing facilitative leadership skills to create the right climate for stronger relationships and positive lasting results.

7 Professional Fees

7.1 Professional Fees

Please note that the cost for travel is not included in this proposal as they are subject to negotiation once a location has been confirmed (see 7.2 Travel Cost Estimates). Based on the proposed solution outlined in Section 4, excluding travel, the proposed price for these services is as follows:

Service	Daily Rate	Days	Amount
Phase 1			
Details regarding preparation and design including	\$ 1,650.00	2.0	\$ 6,540.00
<ul style="list-style-type: none"> • The Kick-off Meeting; • Stakeholder engagement; and • Methodology 	\$ 1,080.00	3.0	
Are included in section 4.1			
Phase 2			
Details regarding the facilitation of the strategic planning meeting are included in section 4.2.	\$ 1,650.00	1.0	\$ 2,730.00
	\$ 1,080.00	1.0	
Phase 3			
Details regarding the final report preparation are included in section 4.3	\$1,080.00	2.0	\$ 2,985.00
	\$1,650.00	0.5	
Total Professional Fees			\$ 12,255.00
Estimated Tax			\$1,593.15
Total (exclusive of travel expenses)			\$ 13,848.15

7.2 Travel Cost Estimates

At this time, the event is tentatively scheduled in Toronto, ON. Travel costs will be determined upon confirmation of the event location. Should a location outside of the capital area be secured then all required travel, meals and/or accommodations will be charged according to [Government of Canada/National Joint Council \(NJC\) guidelines](#), where applicable.

7.3 Payment and Contract Terms

Contracts and payments should be made to the name of: "Intersol Group: Marc Valois Inc."

Intersol Group: Marc Valois Inc.
HST Number: 87815 7205 RT0001
PBN #87815 7205 PG0001

Services rendered will be subject to either GST or HST in compliance with the HST place of supply rules. Invoices are due upon receipt; an interim invoice will be issued at the end of each phase.

SERVICE	INVOICE DATE
Phase 1: Preparation and Design	
Kick Off Meeting Online Pre-Engagement Survey Environmental Scan Summary	April 30th
Phase 2: Facilitation	
Facilitation of 1-day Planning Workshop	May 31st
Phase 3: Report	
Preparation of Final Report	June 15th