



Response #1 to ITQ # 1000309104

Technical Review for the Scientific Research and Experimental Development Program

February 25, 2013

This document consists of three parts,

- Part 1: List of Response Documents
- Part 2: Questions and Answers
- Part 3: Amendments to the ITQ (none applicable at this time)

Part 1: LIST OF RESPONSE DOCUMENTS

Document Title	Dated	Items Amended in RFP	Questions & Answers
Response 1	February 25, 2013	<ul style="list-style-type: none"> • None applicable 	1-7

Part 2: QUESTIONS AND ANSWERS

#	Question	CRA's Response
1	<p>In section 3.2.1 there is a discussion about conflict of interest "When a Bidder would prepare or help to prepare SR&ED claims for itself or for other taxpayers/claimants to be sent to the CRA.". To what scope is the term "bidder" in this context?</p> <p>a) If the 'bidder' is a company with many employees, one of which is the named resource for QSL, does the entire company become non-compliant?</p> <p>b) If the bidder's proposed resource works on SR&ED projects, but does not do the tax claim preparation, would that be a conflict of interest?</p>	<p>The Bidder is a company and the resource is the actual person that will be doing the work. While the bidder submits a proposal (or bid) to the ITQ, it is the resource that is evaluated and placed on the QSL if found qualified.</p> <p>a) Yes, if the bidder is in conflict. When a bidder is considered in conflict, then the entire company becomes non-compliant as all its employees (resources) work for the bidder.</p> <p>b-1) If the bidder is in conflict, then Yes, the resource is in conflict. This is the same as a) above.</p> <p>b-2) If the bidder is not in conflict, then No, the resource would not be in a conflict of interest. Working on SR&ED projects would not be considered to be in conflict and would be considered as acceptable experience.</p>



	<p>c) If the bidder has filed SR&ED claims in previous years, is that reason for the bidder (and/or the proposed resource) to become non-compliant?</p>	<p>c) Yes, both would be considered non-compliant. The bidder for having filed claims and the resource for being employed by the bidder.</p>
<p>2</p>	<p>(Our company) had a Designated Organizational Screening at the 'Reliability Status' for which I am the company's security officer. If we would like to have that enhanced to "Protected B/Classified", as required for this RFP, would you be able to assist us in that respect?</p>	<p>Personnel Screening Requirements The Security Requirements Checklist (SRCL) contained in ITQ 1000309104 at SECTION 5 – MODEL CONTRACT, Annex B, states that the Personnel Screening requirements are 'Reliability Status'.</p> <p>Reference the ITQ, OVERVIEW/ REQUIREMENT, item 4.0 PERSONNEL SECURITY SCREENING</p> <p><i>4.1 The Consultant must maintain a valid personnel security screening level of 'Reliability Status' as per SECTION 5 – MODEL CONTRACT, ANNEX B – SECURITY REQUIREMENTS CHECKLIST, for the duration of the QSL. Expiry of the personnel security screening level will result in removal of the Consultant from the QSL.</i></p> <p><i>4.2 Should a Consultant's personnel security screening level approach its expiry, it is the Consultant's responsibility to send a request for renewal to the QSL Authority no less than six (6) months prior to the expiry date. The QSL Authority will initiate contact between CRA's Security and Internal Affairs Directorate (SIAD) and the Consultant.</i></p> <p>Facilities Clearance – Canadian Contractors</p> <p>Canadian contractors are not required to have a facilities clearance.</p> <p>Reference SECTION 2 – EVALUATION AND SELECTION, Item 2.1.2.2.1 Security Requirements – Canadian Contractors, paragraph 3:</p> <p><i>Processing of material only at the Protected B level is permitted under this contract. The</i></p>



		<p><i>work must be done either on a separate stand-alone computer system at the Contractor's site or on a restricted directory that is only accessible to Contractor personnel who have the need-to-know for the performance of the Contract.</i></p> <p>Encrypted laptops will be provided to all Consultants who are awarded a contract and are required to comply with the ITQ SECTION 5 MODEL CONTRACT, Annex E - LAPTOP RELEASE – CERTIFICATION FOR SAFEGUARDING OF PROTECTED INFORMATION AND ASSET</p> <p>Facilities Clearance – Non Canadian Contractors</p> <p>Non-Canadian contractors are required to hold an approved facilities clearance.</p> <p>Reference SECTION 2 – EVALUATION AND SELECTION, Item 2.1.2.2.1 Security Requirements – Non Canadian Contractors, paragraph 2:</p> <p><i>The Contractor shall, at all times during the performance of the Contract, hold an approved facility clearance for Document Safeguarding at the Protected B level issued or granted by CIISD or a letter issued by the SIAD confirming that the facility is approved and meets the CRA security requirements.</i></p> <p>Non-Canadian contractors who do not hold a facilities clearance must notify the QSL Authority, in writing, requesting assistance in contacting CRA's SIAD.</p>
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3	Does the bidder have to create a business entity (for evidence of corporate status) prior to submission?	<p>CRA's response depends on if your business entity is a corporation.</p> <p>Yes, if the bidder is a corporation, you will need to provide evidence of corporate status as part of your submission.</p> <p>No, if the bidder is not a corporation, it does not need to create a corporate status. A bidder may be a sole proprietor.</p> <p>All types of businesses must ensure they have the licenses required to perform the work in the area they are offering services.</p> <p>Reference QSL OVERVIEW/REQUIREMENT Item 5.0 - BUSINESS LICENSES OR PERMITS</p> <p><i>5.1 Business Licenses or Permits</i></p> <p><i>5.1.1 The Consultant must maintain any valid Business Licenses or Permits or Insurances required to perform work for the duration of the QSL. Evidence of corporate status must be evidenced prior to any contract award.</i></p>
4	Does the bidder have to acquire a Procurement Business Number prior to submission?	<p>Yes. If you wish to do business with the federal government, it is mandatory that you obtain a Procurement Business Number (PBN). You do not need to be a corporation to obtain a PBN.</p> <p>Reference QSL OVERVIEW/REQUIREMENT Item 5.0 - BUSINESS LICENSES OR PERMITS</p> <p><i>5.2 Procurement Business Number</i></p> <p><i>5.2.1 Canadian suppliers must have a Procurement Business Number (PBN) prior to placement on the QSL. Suppliers may register for a PBN in the Supplier Registration Information service on line at the PWGSC – Buy and Sell Website at: https://buyandsell.gc.ca/for-businesses/register-as-a-supplier.</i></p>
5	Can I assume the Bidder and Resource Person can be the same person re. Table I and Table J?	<p>Yes, in the case of sole proprietorships the bidder and the resource would be the same.</p>



6	I am a professional engineer in Ontario (P.Eng.) with university degrees from London University (England). The web site suggested by CRA for providing the credential assessment service is not in service at this time. Is there an alternate service provider for this?	<p>No, CRA is not aware of an alternate service provider for this.</p> <p>At time of responding to this question, the website suggested in the QSL/OVERVIEW, Item 6.0 FOREIGN CREDENTIALS, is functioning. http://www.cicic.ca/</p> <p>As a Professional Engineer that is licensed by a Province in Canada and you can provide proof of that license, you would meet the educational requirement because it is a requirement of all Provinces that Professional Engineers have a Canadian University degree or equivalent.</p>
7	I have been in the Qualified Suppliers List of the Technical Review for the Research and Experimental Development Program for the last 10 years and I have to renew it. Is this form (#1000 309 104) only for new candidates? Could you kindly tell me what to do?	<p>Anyone wishing to qualify on the Scientific Research and Experimental Development (SR&ED) Qualified Supplier List (QSL) must submit a proposal to the Invitation to Qualify (ITQ) # 1000309104, currently posted on MERX.</p> <p>The ITQ is for ALL QSL applicants. ALL applicants are considered NEW.</p> <p>Any bidders or resources who qualified on any previous Qualified Supplier Lists are required to re-apply.</p> <p>Instructions for submissions are contained within the ITQ document.</p>

Part 3 – AMENDMENTS TO THE ITQ

There are no RFP Amendments to the ITQ in Response 1.