



REQUEST FOR PROPOSAL (RFP)

DND Reference Number: DND 13/0000538

Special Intelligence Advisors

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

TABLE OF CONTENTS**PART I**

INTRODUCTION

PART II

INSTRUCTIONS FOR SUBMITTING PROPOSALS

PART III

REQUIREMENTS AND CONDITIONS OF CONTRACT AWARD

ANNEXES

ANNEX A –	STATEMENT OF WORK
ANNEX B –	EVALUATION CRITERIA & SELECTION METHODOLOGY
ANNEX C –	SECURITY REQUIREMENTS CHECKLIST AND SECURITY CLASSIFICATION GUIDE
ANNEX D –	DND 626 TASK AUTHORIZATION FORM

APPENDICES

APPENDIX I TO ANNEX A	INFORMATION SPECIFIC TO THE INTELLIGENCE DIRECTIVES AND POLICY ADVISOR
APPENDIX II TO ANNEX A	INFORMATION SPECIFIC TO THE INTELLIGENCE EXERCISE PLANNER AND LESSONS LEARNED COORDINATOR
APPENDIX 1 –	FEDERAL CONTRACTOR’S PROGRAM
APPENDIX 2 –	AUTHORIZATION AND AVAILABILITY CERTIFICATION FOR RESOURCES WHO ARE NOT EMPLOYEES OF THE BIDDER
APPENDIX 3 –	FORMER PUBLIC SERVANT CERTIFICATION
APPENDIX 4 –	NON-DISCLOSURE AGREEMENT
APPENDIX 5 –	REQUIREMENTS PRECEDENT TO TASK AUTHORIZATION APPROVAL



PART I – INTRODUCTION

1. Introduction

1. The Department of National Defence (DND) has a requirement for the professional services of two (2) Special Intelligence Advisors. Up to two (2) contracts may be awarded to meet this requirement.
 - 1.1 The contract period will from the date of contract award to one year later, and will include two (2) additional one-year option periods.

2. Terms and Conditions of the Resulting Contract

The following terms and conditions will form part of the resulting Contract.

- 2.1 The “General Conditions - Higher Complexity - Services” used by Public Works and Government Services Canada, Clause ID 2035 (2013-06-27) will form part of any resulting contract, with the following modifications:
 - 2.1.1 The definition of “Minister” will be the Minister of National Defence.
 - 2.1.2 2035 41 (2012-11-09) Code of Conduct and Certifications – Contract is hereby deleted and replaced with the following:

Code of Conduct for Procurement

The Contractor certifies that it has read the *Code of Conduct for Procurement* and agrees to be bound by its terms.

- 2.2 The “Standard Instructions – Goods or Services – Competitive Requirements” used by Public Works and Government Services Canada, Clause ID 2003 (2013/06/01), is incorporated as part of this RFP, the only modification being the definition of “Minister” which will be the Minister of National Defence.
- 2.3 “Canada to Own Intellectual Property Rights in Foreground Information” used by Public Works and Government Services Canada, Clause ID 4007 (2010-08-16), will form part of any resulting contract, the only modification being the definition of “Minister” which will be the Minister of National Defence.
 - 2.3.1 The Department of National Defence has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: National Security.
- 2.4 The “Former Public Servants – Competitive Requirements” Clause ID A3025T (2013/07/10), will form part of this RFP and any contract resulting from the RFP.
- 2.5 The “Proactive Disclosure of Contracts with Former Public Servants” Clause ID A3025C (2013/03/21), will form part of any resulting contract.
- 2.6 The documents can be found in the Standard Acquisitions Clauses and Conditions (SACC) Manual at: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>.

PART II – INSTRUCTIONS FOR SUBMITTING PROPOSALS**3. Number of Proposals**

For Proposals submitted by Canada Post: The Bidder is requested to submit three (3) copies of its Technical Proposal, one (1) copy of its Financial Proposal and one (1) copy of the Certifications. Canada requests that Bidders advise the DND POC by email if they are submitting their proposals by Canada Post. For Proposals submitted by electronic mail: The Bidder is requested to submit one (1) copy of its Technical Proposal, one (1) copy of its Financial Proposal and one (1) copy of the Certifications. Technical Proposals and Financial Proposals shall be submitted as separate documents and no financial information should appear in the Technical Proposal. Individual e-mails that exceed five (5) megabytes, or that include other factors such as embedded macros and/or links, may be rejected by the DND e-mail system and/or firewall(s) without notice to the Bidder or DND POC. Larger bids may be submitted through more than one e-mail. The DND POC will confirm receipt of documents. It is the Bidder's responsibility to ensure that the DND POC has received the entire submission. Bidders must not assume that all documents have been received unless the DND POC confirms receipt of each document. In order to minimize the potential for technical issues, bidders are requested to allow sufficient time before the closing time and date to confirm receipt. Technical and financial documents received after the closing time and date will not be accepted.

4. Identification of Bidder's Contact

- 4.1 The contact information of the Bidder's representative (including name, address, telephone number and email address) is to be included and clearly identified in the Proposal to facilitate any communication during the evaluation process.

5. Delivery Instructions for Proposals

- 5.1 Proposals may be submitted either by electronic mail or Canada Post. Proposals which are hand-delivered or delivered by courier, including Purolator, will be deemed NON-COMPLIANT. Proposals mailed by Canada Post must be POST MARKED by Canada Post on or before the closing date of **4 September 2013**; or for proposals mailed from outside Canada, by a recognized national postal service. Responses submitted by electronic mail must be received by DND no later than 2:00 p.m. on the closing date of the solicitation. Responses submitted by Canada Post or by a recognized national postal service (for requirements mailed from outside Canada) that are postmarked after the Closing Date and Time will be returned unopened. Responses that are submitted by electronic mail that are received by DND after the Closing Time and Date will be deemed non-compliant.
- 5.2 Proposals should be submitted as follows:

By mail to:

Director Services Contracting (D Svcs C) 4-3-5
Department of National Defence
101 Colonel By Drive
Ottawa, ON K1A 0K2

or by Electronic Mail to:

Email: Kim.Seguin@forces.gc.ca

Solicitation Number: DND 13/0000538

Closing Date and Time: **4 September 2013, 2:00 p.m.**



- 5.3 Bidders are to ensure that the Solicitation Number (**DND 13/0000538**) and Closing Date (**4 September 2013**) are clearly marked on all correspondence.
- 5.4 Proposals may be submitted in either English or French.
- 5.5 Proposals will not be returned.
- 5.6 No payment will be made for costs incurred in the preparation and submission of a proposal in response to this RFP.

6. Communications Regarding the Bid Solicitation

- 6.1 To ensure the integrity of the competitive bid process, enquiries and other communications regarding this solicitation are to be directed **only** to the D Svcs C Contracting Officer by email at Kim.Seguin@forces.gc.ca.
- 6.2 Enquiries and other communications are not to be directed to any other government official(s) or person having access to government buildings or information. Enquiries are to be directed only as detailed above, in sub-paragraph 6.1. Non-compliance with this condition during the solicitation period may, for that reason alone, result in the disqualification of the Proposal.
- 6.3 Enquiries shall be in writing and received by the D Svcs C Contracting Officer at least **ten (10) calendar days** prior to the bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be answered.
- 6.4 It is the responsibility of the Bidder to obtain clarification of any terms, conditions or technical requirements contained in the RFP. During the RFP posting period, potential Bidders are encouraged to submit questions or requests for clarification regarding the content of the RFP. This is the only opportunity prior to bid closing for Bidders to address issues or raise any concerns related to RFP content.
- 6.5 To ensure consistency and quality of information provided to Bidders, relevant enquiries received, and the replies to such enquiries, will be provided via Canada's Government Electronic Tendering Service (GETS), without revealing the source(s) of the enquiries.

7. Validity of Bids

- 7.1 Any Proposal submitted shall remain open for acceptance of a period of not less than ninety (90) days after the closing of the RFP. Amendments to the Bidders' bid/Proposal response will not be accepted after bid closing.
- 7.2 All Bidders submitting Proposals will receive written notification of the results of the evaluation as soon as the process is complete. Bidders should allow at least forty-five (45) days after bid closing for results to be known. Responses to requests for information on the status of the evaluation will not normally be provided until all evaluations are complete.

8. Rights

- 8.1 DND reserves the right to:
 - a. reject any or all Proposals received in response to this RFP
 - b. cancel this RFP at any time
 - c. reissue the RFP
 - d. seek clarification and verify any or all information provided with respect to this RFP, and



- e. negotiate with the sole responsive Bidder to ensure Best Value to the Crown.

9. Pricing Support/Review

- 9.1 In the event that the Bidder's Proposal is the sole responsive proposal received, the Bidder shall provide, upon DND's request, acceptable forms of price support.
- 9.2 Bidders are advised that a review of the proposed pricing may be required. Detailed supporting information may be requested by DND to validate the rates and other charges proposed.

10. Task Authorization

- 10.1 Services to be provided under the Contract on an "as-and-when-requested basis" will be ordered by Canada using the Task Authorization (TA) process.
- 10.2 **Task Authorization Process:** If a requirement for a specific task is identified, a draft "statement of task" will be prepared by the Procurement Authority and sent to the Contractor. Once it receives the statement of task, the Contractor must submit a response to the Procurement Authority identified in the TA detailing the cost and time to complete the task. The Contractor's response must be based on the rates set out in the Contract. The Contractor will not be paid for providing the response or for providing other information required to prepare and issue the TA. The Contractor must provide any information requested by Canada in relation to the preparation of a TA within three working days of the request, unless otherwise specified.
- 10.3 **Approval Process:** If Canada approves the Contractor's task response, Canada (by its authorized representative, as described in this contract) will issue the TA by forwarding a signed copy of the final TA form to the Contractor. Whether or not to approve or issue a TA is entirely within Canada's discretion.
- 10.4 **Authority to Issue a TA:** Any TA with a value less than or equal to \$**amount to be specified in the resulting contract** (including GST/HST) may be issued by the Procurement Authority. Any TA with a value greater than this amount must be issued directly by the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Procurement Authority's authority to issue TAs at any time.
- 10.5 **Contents of a TA:** A Task Authorization must contain the following information, if applicable:
- (i) a task number;
 - (ii) the details of any financial coding to be used;
 - (iii) the number of resources in each category required;
 - (iv) a statement of work for the task outlining the activities to be performed and identifying any deliverables;
 - (v) the duration of the task (start and end dates);
 - (vi) milestone dates for deliverables and payments (if applicable);
 - (vii) the number of person-days of effort required;
 - (viii) the specific work location;
 - (ix) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
 - (x) any other constraints that might affect the completion of the task.



- 10.6 **Charges for Work under a TA:** The Contractor must not charge Canada anything more than the price set out in the Task Authorization unless Canada has issued a TA amendment authorizing the increased expenditure. Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before being incorporated into the Work.
- 10.7 **Consolidation of TAs for Administrative Purposes:** The Contract may be amended from time to time to reflect all Task Authorizations issued and approved by the Contracting Authority to date, to document the Work performed under those TAs for administrative purposes.
- 10.8 **Refusal of Task Authorizations:** The Contractor is required to submit a response to every draft statement of task issued by Canada. Canada may immediately, and without further notice, terminate the Contract for default if the Contractor does not submit a response to a draft statement of task issued during the Contract Period.
- 10.9 **Minimum Work Guarantee**
- (a) In this clause, “**Minimum Contract Value**” means a fixed amount of \$25,000.00.
 - (b) The Contractor must perform the Work described in the Contract as and when requested by Canada during the Contract Period. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph c. In consideration of this obligation, the Contractor agrees to stand in readiness throughout the Contract Period to perform the Work described in the Contract.
 - c. If Canada does not request work in the amount of the Minimum Contract Value during the Contract Period, Canada must pay the Contractor the difference between the Minimum Contract Value and the cost of the Work performed.
 - d. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

PART III - REQUIREMENTS AND CONDITIONS OF AWARD OF A CONTRACT

11 Applicable Laws

- 11.1 Any resulting contract shall be interpreted and governed, and the relations between the Parties determined, by the laws in force in the Province of Ontario, Canada.

The Bidder may, at its discretion, substitute the applicable laws of a Canadian province or territory of its choice without affecting the validity of its bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of its choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidder.

12 Terms of Payment

- 12.1 **Basis of Payment:** The Basis of Payment will be firm fixed per diem pricing, based on the rates of the successful Bidder's Financial Proposal.
- 12.2 **Method of Payment:** Monthly payment by Her Majesty to the contractor for the work shall be made within thirty (30) days following the delivery and acceptance of all deliverables or the date of receipt of a duly completed invoice, whichever date is later.



13 Requirements of Award of a Contract

One (1) copy of the following document must be provided to the Contracting Authority prior to the award of any resulting contract.

- 12.1 Federal Contractor's Program Certificate: In accordance with the Federal Contractors Program, Bidders are required to certify their status with FCP-EE in accordance with Appendix '1' to this RFP. Any bid from ineligible contractors will not be considered for award of a contract.

Information to Bidders: It is highly recommended that the completed and signed FCP Certificate (Appendix '1') be provided with the technical proposal at the time of bid closing.

- 12.2 Authorization and Availability Certification for Resources Who are not Employees of the Bidder: The Bidder must obtain the completed and signed Certification in Appendix '2' from his/her subcontractor(s).

Information to Bidders: It is highly recommended that the completed and signed Authorization and Availability Certification (Appendix '2') be provided with the technical proposal at the time of bid closing.

- 12.3 Former Public Servant Certification: The Bidder must obtain the completed and signed Former Public Servant Certification in Appendix '3' from his/her employee(s) or subcontractor(s).

Information to Bidders: It is highly recommended that the completed and signed Former Public Servant Certification (Appendix '3') be provided with the technical proposal at the time of bid closing.

- 12.4 Non-Disclosure Agreement: The Bidder must obtain the completed and signed non-disclosure agreement in Appendix "4" from his/her employee(s) or subcontractor(s) before they are given access to information by or on behalf of Canada in connection with the Work.

Information to Bidders: It is highly recommended that the completed and signed Non-Disclosure Agreement (Appendix '4') be provided with the technical proposal at the time of bid closing.

13. Security – Top Secret:

- 13.1 The Contractor must, at all times during the performance of the Contract, hold a valid Facility Security Clearance at the level of **TOP SECRET**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- 13.2 This contract includes access to controlled goods. Prior to access, the contractor must be registered in the Controlled Goods Program of Public Works and Government Services Canada. In order to gain access to **Controlled Goods**, the contractor personnel, who DND would deem to be embedded contractors, pursuant to the 2007 Exchange of Letters between DND and the U.S. Department of State, **must EACH be citizens of Canada** and hold a valid **TOP SECRET** clearance, granted or approved by CISD/PWGSC.
- 13.3 The Contractor/Offeror personnel requiring access to **PROTECTED** information, assets or sensitive work site(s) must **EACH** hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC.
- 13.4 The Contractor/Offeror personnel requiring access to **CLASSIFIED** information, assets or sensitive work site(s) **must be citizens of Canada and must EACH** hold a valid personnel security screening at the level of **CONFIDENTIAL, SECRET or TOP SECRET, as required**, granted or approved by CISD/PWGSC.
- 13.5 The Contractor personnel requiring access to **CLASSIFIED** information, assets or sensitive work site(s) **must be citizens of Canada and must EACH** hold a valid personnel security screening at the level of



TOP SECRET SIGINT, processed by Canadian Industrial Security Directorate and granted by Communications Security Establishment.

- 13.6 The Contractor/Offeror personnel requiring access to **NATO CLASSIFIED** information, assets or sensitive work site(s) **must be citizens of Canada and must EACH** hold a valid personnel security screening at the level of **NATO CONFIDENTIAL, or NATO SECRET, as required**, granted or approved by the appropriate delegated **NATO Security Authority**.
- 13.7 The Contractor personnel requiring access to **FOREIGN CLASSIFIED** information, assets or sensitive work site(s) **must be citizens of Canada and must EACH** hold a valid personnel security screening at the level of **TOP SECRET SIGINT**, processed by Canadian Industrial Security Directorate and granted by Communications Security Establishment.
- 13.8 The Contractor **MUST NOT** remove any **CLASSIFIED** information from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
- 13.9 Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC
- 13.10 The Contractor must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - (b) *Industrial Security Manual* (Latest Edition).

13.11 **Information Subject to Limited Access**

There is a requirement for the Contractor's resources to access information available exclusively at DND facilities. The resources must possess a valid TOP SECRET (Level III) security clearance and hold a valid indoctrination to SPECIAL ACCESS, GAMMA, and TK compartments for the duration of the contract. Indoctrination into special compartments will be wholly managed by DND through CJOC, after contract award. The Contractor will be required to provide personal information regarding the Contractor's resources, including but not necessarily limited to the resources' date and location of birth, and social insurance number. The resources will be required to undergo a short security briefing. The resources will be required to maintain the security of the information applicable under the auspices of the compartments.

14. **Replacement of Personnel**

- 14.1 After Award of a Contract, in exceptional circumstances where it becomes necessary to replace a proposed resource with a substitute resource:
 - a. Requests to replace a proposed resource shall be submitted to the Contracting Authority, the D Svcs C Contracting Officer, and
 - b. The qualifications of the proposed substitute shall meet/exceed the qualifications of the resource being replaced.



**STATEMENT OF WORK
SPECIAL INTELLIGENCE ADVISORS**

**See Appendix I to Annex A for information specific to the
Intelligence Directives and Policy Advisor.**

**See Appendix II to Annex A for information specific to the
Intelligence Exercise Planner and Lessons Learned Coordinator**

1.0 SCOPE

1.1 Objective

1.1.1 DND has a requirement for the provision of two Special Intelligence Advisors.

One Special Intelligence Advisor, the Intelligence Exercise Planner and Lessons Learned Coordinator, is required to provide staff work, assistance, expert advice and guidance in the planning of exercises and in the development, tracking, integration and follow up of lessons learned during operations and exercises.

The other Special Intelligence Advisor, the Intelligence Directives and Policy Advisor, is required to provide support of the transfer of existing Canada Command (Canada COM), Canadian Expeditionary Forces Command (CEFCOM) and Canadian Operational Support Command (CANOSCOM) intelligence-related directives, the development of new directives, and the structuring and implementation of these directives within the new Canadian Joint Operations Command (CJOC) construct.

1.2 Background

1.2.1 General Background

CJOC was created from the amalgamation of three former commands: Canada COM, CEFCOM and CANOSCOM. CJOC is the Canadian Armed Forces (CAF) organization responsible for all routine and contingency CF operations in Canada, continental North America and throughout the world (less those undertaken by the Canadian Forces Special Operations Forces Command and the North American Aerospace Defence Command), as required by the Government of Canada. CJOC develops, generates and integrates joint force capabilities, enabling maritime, land, air and special operations at home and abroad for operations. CJOC is a single point of contact for Canadian civil authorities seeking CF support and a single military operational command for CAF domestic, continental and international operations.

2.0 Constraints

2.1 Location of Services

The majority of services will be provided at DND facilities during regular business hours. All classified-level services must be performed at DND facilities. Any work conducted at the Contractor's location will require prior written approval by the technical authority (TA) and can only be conducted at the UNCLASSIFIED level.

2.2 Government Supplied Facilities, Material and Equipment

For services performed at DND facilities, DND will provide workspace with computer workstations, appropriate connections to databases and other software applications as required to perform the work



2.3 Limitations – Comments and Recommendations.

Decisions concerning definition or revision of policy, budgets or contractual obligations and requirements are excluded from the Contractor's services. The Contractor's responsibilities are limited to providing comments and recommendations on these issues, should they arise during the performance of the contract.

2.4 Limitations – Direction

During the performance of the Contract, the Contractor's resources must not direct any departmental organizations, or any personnel of any third parties with whom Canada has or intends to contract, to perform any action.

2.5 Access to Proprietary Information

At all times during the provision of the required services, the Contractor and the Contractor's resources must not have access to any proprietary information, including but not limited to financial information (including unit prices or rates) or technical information concerning any third parties with whom Canada has contracted or intends to contract, other than information that is in the public domain, (e.g. total value of contract(s) awarded).

2.6 Handling of Information

All reports, data, documents, or materials, provided to the Contractor or to the Contractor's resources by Canada or produced by the Contractor personnel in providing services under the Contract, remain the property of Canada and shall be used solely in support of this requirement. The Contractor and the Contractor's resources must safeguard the preceding information and materials from unauthorized use and must not release them to any third party, person or agency external to DND without the express written permission of the TA. Such information and material must be returned to the TA when requested.

2.7 Records and Written Documentation

All records and written documentation, either initiated by the Contractor's resources or by DND, shall be managed as per the Government of Canada Policy on Information Management and the Access to Information Act.

2.8 Use of Government of Canada and DND identifiers

The Contractor's resources must not use Government of Canada or DND designations, logos or insignia on any business cards, cubicle/office signs or written and electronic correspondence that in any manner could lead others to perceive the Contractor's resources to be an employee of Canada.

2.9 Language Requirements

The Contractor's resources must be able to communicate proficiently, both orally and in writing, in English.

3.0 Progress Meetings

3.1 Preparation and Participation

3.1.1 The Contractor personnel shall make all necessary preparations in order to actively participate in any meeting convened by the TA.



3.2 Frequency and location

- 3.2.1 It is expected that the TA and the Contractor's personnel will meet monthly, at a minimum, at a pre-determined location within the National Capital Region or in the vicinity of any of the facilities where capability activities are being conducted as specified by the TA.

4.0 Travel and Living Expenses

- 4.1 All travel and living expenses incurred while providing services within the National Capital Region (NCR) will be the responsibility of the Contractor. All travel and living expenses incurred for travel outside of the NCR will be reimbursed in accordance with National Joint Council Travel Directives. All travel must be pre-approved in writing by the TA. There may be a requirement for international travel.

5.0 References and Applicable Documents

The technical authority will provide some background documents to the Contractor's resources upon contract award. The resources will be required to research and collect any other required documentation, with assistance from CJOC J2 and other CJOC staff as applicable.

6.0 Intellectual Property

All drawings, reports, data, documents, or materials provided to the Contractor's resources by Canada or produced by the Contractor's personnel in providing product or services under the Contract, remains the property of Canada and shall be used solely in support of this requirement. The Contractor's resources shall be required to safeguard the preceding information and materials from unauthorized use and shall not release them to any third party, person or agency external to DND without the express written permission of the TA. Such information and material shall be returned to the TA upon completion of the services or when requested by the TA.

7.0 Responsibilities

7.1 TA's Responsibilities

- 7.1.1 To aid the Contractor's resource in the provision of the required services, the following information, materials, and assistance will be provided if available and deemed appropriate by the TA such as:
- 7.1.2 All available data, documents and/or database access deemed necessary by the TA for the provision of services under this SOW;
- 7.1.3 Consultation with the TA and other Crown Specialists as may be arranged by the TA;
- 7.1.4 Other information, data and assistance available and requested by the Contractor's resource subject to the concurrence by the TA; and
- 7.1.5 CJOC related training not readily available from a commercial source such as Operational Security training and applicable CJOC staffing procedures.

7.2 Contractor's Responsibilities:

- 7.2.1 Travel arrangements: The Contractor's resource shall arrange its pre-approved required travel to deliver the services detailed herein.



- 7.2.2 Access arrangements: The Contractor's resource shall resolve all access and security issues to deliver the services detailed herein with the assistance, and to the satisfaction, of the TA.
- 7.2.3 Work under the Contract: The Contractor shall be responsible for all work produced under this contract, including completeness, accuracy and adherence to all relevant security regulations, rules and good practices.
- 7.2.4 Quality Assurance: The Contractor is responsible for performing or having performed all inspections necessary to substantiate that the services provided conform to the requirements of this SOW.
- 7.2.5 Contract management: The Contractor shall be required to actively participate in the overall management of all activities related to this SOW and will be directly responsible for the effective coordination of the efforts of its personnel in order to minimize the effort required by DND to manage the requirement.



Information specific to the

INTELLIGENCE DIRECTIVES AND POLICY ADVISOR

1.0 SCOPE

1.1 Objective

- 1.1.1 The objective of Appendix I to Annex A is to highlight the tasks and deliverables required of the Intelligence Directives and Policy Advisor to develop and implement operational-level intelligence directives and policy in support of J2, Canadian Joint Operations Command Headquarters (J2 CJOC).

2.0 Tasks

- 2.1** Tasks that the Intelligence Directives and Policy Advisor will be required to perform include the following:

- 2.1.1 Take the lead in the development and implementation of the CJOC intelligence directives;
- 2.1.2 Determine what CDI and other pertinent strategic-level organizations have developed, or are developing, in terms of intelligence-related policies and directives that are applicable to CJOC;
- 2.1.3 Identify what intelligence-related directives the former commands developed that are suitable for amalgamation / fusion into the CJOC intelligence directives;
- 2.1.4 Amalgamate or transfer suitable former commands directives into CJOC intelligence directives and prepare draft products for the technical authority's (TA) and J2 CJOC's approval;
- 2.1.5 Identify, as applicable, new intelligence directives that are required beyond those amalgamated or transferred from the former commands;
- 2.1.6 Create drafts of new CJOC intelligence directives, as applicable;
- 2.1.7 Prepare an Implementation Plan for the CJOC intelligence directives;
- 2.1.8 Provide senior-level advice and assistance to J2 CJOC and staff specific to intelligence directives and policies;
- 2.1.9 Prepare submissions and presentations to partners and CJOC senior management as necessary;
- 2.1.10 Develop and provide updates pertaining to the tasks above to CJOC HQ Staff as required by the TA;
- 2.1.11 Lead or attend, as applicable, all appropriate meetings;
- 2.1.12 Produce applicable PowerPoint briefings, staff papers, background briefing notes, status reports, draft directives and other products as required; and
- 2.1.13 Complete any other intelligence directives, policies, tasks and activities as required by the TA.



2.2 Deliverables and Acceptance Criteria

2.2.1 Deliverables

The deliverables required from the Contractor consist of all documentation in support of the tasks and activities linked to the CJOC intelligence directives, including but not limited to presentations, schedules, and memoranda, in DND prescribed formats, compatible with Microsoft Office Suite, required to satisfy the task requirements referred to above. Electronic copies of all deliverables are to be provided, along with paper copies of signed documents.

In addition to the deliverables described above, the following deliverables in support of the CJOC intelligence directives tasks and activities are required to be provided by the Contractor's resource:

- 2.2.1.1 Progress Reports and Project Plans of activities as deemed applicable by the TA;
- 2.3.1.2 Agenda and minutes for all meetings, working groups and conferences as required by the TA;
- 2.2.1.3 Visit reports for all travel that occurs as required by the TA (to include summary of the organization/individuals visited, topics discussed, and follow-on action required by CJOC or expected from other participants); and
- 2.2.1.4 Other reports, presentations and briefings packages in support of CJOC intelligence directives activities, as required by the TA.

2.2.2 Acceptance Criteria

Acceptance of the Contractor's resource deliverables will be based on the following criteria:

- 2.2.2.1 Completeness;
- 2.2.2.2 Accuracy; and
- 2.2.2.2 Clarity.



Information specific to the

EXERCISE PLANNER AND LESSONS LEARNED COORDINATOR

1.0 SCOPE

1.1 Objective

- 1.1.1 The objective of Appendix II to Annex A is to highlight the tasks and deliverables required of the Exercise Planner and Lessons Learned Coordinator to provide intelligence input to the CJOC training exercise program, and to develop, track and integrate intelligence lessons learned and follow up on related decisions in support of Canadian Joint Operations Command Headquarters (CJOC J2 and J7).

2.0 Tasks

- 2.1 Tasks that the Intelligence Exercise Planner and Lessons Learned Coordinator will be required to perform include the following:
- 2.1.1 Review current plans, policies and other reference material as provided by the Technical Authority (TA);
 - 2.1.2 Participate in exercise meetings, in Initial, Main and Final Planning Conferences, and in lessons learned meeting and conferences which can be held from time to time in Ottawa, elsewhere in Canada or abroad;
 - 2.1.3 Plan, organize and lead CJOC J2-specific exercise and lessons learned meetings and conferences;
 - 2.1.4 Participate in scenario writing boards, and develop and synchronize Master Scenario Event Lists (MSEL) in support of J2 and J7 training objectives, which will vary from one exercise to the other;
 - 2.1.5 Prepare intelligence documentation and briefings in support of CJOC exercises as designated by the TA;
 - 2.1.6 Assist in scenario development for specific exercises to support CJOC training objectives;
 - 2.1.7 Develop recommended scenario injects in support of CJOC training;
 - 2.1.8 Review and analyze ground truth documents to ensure that they are accurate and contribute to positive learning experience;
 - 2.1.9 Liaise and coordinate with J2 staff to determine intelligence training requirements;
 - 2.1.10 Liaise and coordinate as necessary with partner intelligence staffs in support of exercise development;
 - 2.1.11 Acquire a sound understanding of partner intelligence staffs and share appropriate information with exercise planners;
 - 2.1.12 Provide guidance, expert advice and oversight during exercise on how best to replicate adjacent and higher organizations to the training audience;
 - 2.1.13 Provide briefings to exercise development staff and players as required;
 - 2.1.14 Participate in the review and development of relevant lessons learned;

- 2.1.15 Capture and / or develop classified and unclassified intelligence lessons learned during exercises and operations;
- 2.1.16 Coordinate the integration of intelligence lessons learned in subsequent exercises and operations;
- 2.1.17 Track intelligence lessons learned and follow up on action to be taken;
- 2.1.18 Develop recommendations for enhancing intelligence requirements in support of CJOC training objectives during exercises.
- 2.1.19 Support the development and writing of CJOC intelligence directives and other documents related to intelligence support to exercises and to intelligence lessons learned by providing guidance to the technical authority (TA);
- 2.1.20 When required by the TA, produce a Work Breakdown Structure which will identify all required resources and an estimated level of effort for critical tasks identified by the TA;
- 2.1.21 When required by the TA, produce a document which identifies major risks that could impact the completion of critical tasks identified by the TA;
- 2.1.22 Produce the ground truth documentation for insertion in the exercise master documents;
- 2.1.23 Produce documents that detail the scenario descriptions and probable / expected outcomes and analyses for each event;
- 2.1.24 Produce reports of the feedback during after-action discussions, and written reports (such as After Action Reports) that detail evaluations of performance relevant to the intelligence field for each exercise;
- 2.1.25 Plan, develop, populate and maintain a classified lessons learned database and related tools;
- 2.1.26 Prepare and deliver presentations for briefings on intelligence specific products in support of CJOC exercises and lessons learned;
- 2.1.27 Produce applicable Power Point briefings, staff papers, background briefing notes, status reports, draft directives and other such products as required;
- 2.1.28 Lead or attend, as applicable, staff planning forums in support of CJOC J2 and J7; and
- 2.1.29 Provide weekly progress reports to the TA summarizing work completed to date, planned work and the identification of any problems, risks or impediments that could impact successful project completion.

2.2 Deliverables and Acceptance Criteria

2.2.1 Deliverables

The deliverables required from the Contractor consist of all project documentation in support of the CJOC intelligence activities, including but not limited to presentations, schedules, and memoranda, in DND prescribed formats, compatible with Microsoft Office Suite, required to satisfy the task requirements referred to above. Electronic copies of all deliverables are to be provided, along with paper copies of signed documents.

2.2.2 Acceptance Criteria

Acceptance of the Contractor's resource deliverables will be based on the following criteria:

- 2.2.2.1 Completeness;
- 2.2.2.2 Accuracy; and
- 2.2.2.2 Clarity.



ANNEX B – EVALUATION CRITERIA & SELECTION METHODOLOGY

B1 Acceptance of Request For Proposal Terms and Conditions

- 1.1 By submitting a Proposal in response to this Request for Proposal, the Bidder agrees that it has read, understood and accepted all of the terms and conditions of the Request for Proposal, including the Statement of Work, Evaluation Criteria and Selection Methodology and any appendices.

B2 Evaluation of Proposals

- 2.1 Proposals submitted for this requirement shall clearly demonstrate that the Bidder meets all of the mandatory criteria. Failure to demonstrate this will result in the Proposal being declared NON-COMPLIANT and the Proposal will be given no further consideration.
- 2.2 The Bidder must clearly demonstrate the relevant experience and qualifications of the proposed resource. Bidders are advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not constitute “demonstrated” for the purpose of the evaluation. Supporting data may include resumes and any other documentation necessary to demonstrate the experience and knowledge attained. Simply repeating the statements contained in the Statement of Work is not sufficient.
- 2.3 In order to evaluate the number of years of experience attained, the Proposal shall, as a minimum, identify the **month and year** when the experience commenced and the **month and year** when the experience was completed. Failure to provide this information will be to the disadvantage of the Bidder. Failure to provide this information in response to a Mandatory Criteria, wherein the number of years of experience is required in order to calculate number of years experience attained, will result in the Proposal being declared NON-COMPLIANT.
- 2.4 In the case where the timelines of experience gained in two or more projects overlap the duration of time common to each project/experience will not be counted more than once. Experience and knowledge shall be relevant to the requirement.
- 2.5 The Proposal will be evaluated solely on its content and the documentation provided as part of the Bidder’s Proposal, except as otherwise specifically provided in this solicitation. Any information or personnel proposed as options or additions to the work will NOT be evaluated.
- 2.6 It is recommended that Bidders include a grid in their proposals, cross-referring the items of the Statement of Work and Evaluation Criteria to statements of compliance with reference to supporting data and/or résumé evidence contained in their Proposals. Any misrepresentation discovered during the assessment will disqualify the entire Proposal from further evaluation.
- Information to Bidders:* The compliance grid, by and of itself, DOES NOT constitute demonstrated evidence. As stated in the paragraphs above, the résumés and/or any supporting documentation will be accepted as evidence.
- 2.7 An evaluation team composed of government officials from the DND Technical Authority will evaluate the technical proposals on behalf of Canada. In addition, Canada reserves the right to include as evaluation members, non-government employees that are not placed in a conflict of interest by participating.



Mandatory and Point Rated Criteria for the Intelligence Directives and Policy Advisor Requirement

Bidders may bid on one or both of the resources as specified in Annex A – Statement of Work, but should submit a separate proposal for each resource.

1. Mandatory Criteria

Responses that clearly demonstrate that all of the mandatory criteria have been met will be evaluated further. It is the bidder’s responsibility to clearly demonstrate that all of the mandatory criteria are met. Responses failing to do so will be ruled non-responsive and will not be considered further.

Bidders are encouraged to supply as much information as necessary to demonstrate clearly that the mandatory requirements are met and to ensure evaluated criteria can be properly assessed.

1.1 Mandatory Criteria

VENDOR’S FACILITY

MANDATORY CRITERIA		PROPOSAL REFERENCE
M1a	The Bidder must hold a valid Facility Security Clearance (FSC) at the TOP SECRET level issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC) at bid closing. <i>This shall be demonstrated by including a copy of the clearance <u>letter</u> issued to the firm by PWGSC/CISD or by providing the organization screening number as provided by PWGSC/CISD</i>	

INTELLIGENCE DIRECTIVES AND POLICY ADVISOR

MANDATORY CRITERIA		PROPOSAL REFERENCE
M1b	The Bidder must clearly demonstrate that its proposed resource possesses a valid TOP SECRET SIGINT security clearance. <i>This shall be demonstrated by including the following information:</i> <ul style="list-style-type: none"> • Name of the individual; • Level of security clearance obtained; • Expiry date; and • Security Screening Certificate and Briefing Form file number 	
M2b	The Bidder must clearly demonstrate that its proposed resource has been indoctrinated SPECIAL ACCESS within the past five years. <i>This shall be demonstrated by including a written confirmation</i>	
M3b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 36 months of combined experience within the past 15 years collaborating with intelligence organizations of the United States, the United Kingdom or Australia in the development of interoperability, the production of joint or common plans, the coordination or execution of joint or common operations or other activities, or in the provision of liaison services	
M4b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 36 months of combined experience within the past 15 years collaborating with one or more federal government department or agency, including but not limited to the RCMP and CSIS, in the development of interoperability, the production of joint or common plans, the coordination or execution of joint or common operations or other activities, or in the provision of liaison services	



M5b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 36 months experience in developing strategic- and operational-level plans, capabilities and procedures for defence / military intelligence support to deployed operations	
M6b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 36 months of combined experience in all of the following: <ul style="list-style-type: none"> • Leading and managing operational support activities; • Providing intelligence advice to military commanders, government directors, and/or deputy ministers and their staffs; and • Developing intelligence support concepts and implementation plans 	
M7b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 24 months of experience in the review and analysis of intelligence documentation. Intelligence is defined as scientific, technical, tactical, diplomatic or sociological reports and briefings dealing with broad issues such as economics, political assessments, military capabilities and intentions of foreign nations or ethnic groups.	
M8b	The Bidder must clearly demonstrate that its proposed resource has a minimum of 36 months experience working with one or more Canadian Defence Intelligence organization, including CDI and the operational commands J2s (CJOC, CANSOFCOM or, previous to the amalgamation, CEFCOM, Canada COM or CANOSCOM) in researching, developing or writing policies, directives or orders.	
M9b	The Bidder must clearly demonstrate that its proposed resource has acquired a minimum of 48 months of applied knowledge and skills from working with level II and level III Canadian classified systems (examples include but are not limited to CSNI and SPARTAN)	

Only those bids meeting all of the Mandatory Qualifications will be considered further. It is imperative that all indicated qualifications and experience are fully demonstrated and supported in the proposal to be declared responsive. Simply listing or stating that a qualification or experience exists will not suffice for the purposes of demonstrated.

2. Rated Criteria

Proposals meeting all Mandatory Criteria will be further evaluated against the Rated Criteria shown below. It is the bidder's responsibility to ensure that sufficient information is provided to properly evaluate these criteria. Such information could include, but is not limited to resumes, company profile, company history, proposed work plan, breakdown of level of effort, description of methodology and references. See Annex B Section B2 Evaluation of Proposals.

The following are the RATED CRITERIA. Points will be allocated for each Rated Criteria as shown.

2.1 Rated Criteria

INTELLIGENCE DIRECTIVES AND POLICY ADVISOR

Item	Requirement	Maximum Points	Rating Scale	Proposal Reference
R1b	The Bidder should clearly demonstrate that the proposed resource has experience collaborating with Other Government Departments or Agencies (OGDs) and/or Allied organisations. OGDs refer to Foreign Affairs and International Trade Canada (DFAIT), Public Safety Canada (PSC), Royal Canadian Mounted Police (RCMP),	12	1 point per month beyond the mandatory 36 months within the past 15 years (M4b)	



Item	Requirement	Maximum Points	Rating Scale	Proposal Reference
	Canadian Security Intelligence Service (CSIS) and Canada Border Services Agency (CBSA).			
R2b	The Bidder should clearly demonstrate that the proposed resource has experience in developing strategic- and operational-level plans, capabilities and procedures for defence / military intelligence support to deployed operations	24	2 points per month beyond the mandatory 36 months (M5b)	
R3b	The Bidder should clearly demonstrate that its proposed resource has experience in the review and analysis of intelligence documentation. Intelligence is defined as scientific, technical, tactical, diplomatic or sociological reports and briefings dealing with broad issues such as economics, political assessments, military capabilities and intentions of foreign nations or ethnic groups.	30	1 point per month beyond the mandatory 24 months (M7b)	
R4b	The Bidder should clearly demonstrate that its proposed resource has experience working with any Canadian Defence Intelligence organizations at the strategic or operational level, including CDI and the operational commands J2s (CJOC, CANSOFCOM or, previous to the amalgamation, CEFCOM, Canada COM or CANOSCOM) in researching, developing or writing policies, directives or orders.	24	2 points per month beyond the mandatory 36 months (M8b)	
R5b	The Bidder should clearly demonstrate that the proposed resource has experience in a combination of the following: <ul style="list-style-type: none"> • leading and managing operational support activities; • providing intelligence advice to military commanders, government directors, and/or deputy ministers and their staffs; and • developing intelligence support concepts and implementation plans 	18	2 points per month beyond the mandatory 36 months (M6b)	
	Total Points Available:	108		

3. Financial Proposal

Financial Proposals are to be submitted in a document separate from the Technical Proposal.

Bidders shall propose Firm Fixed Per Diem Rates, exclusive of GST/HST, as per the Table below. It is mandatory that the Bidders include the following (or similar) grid as part of their financial proposal. It is the Bidder's responsibility to account for any other costs not explicitly stated in the financial grid below.



For evaluation purposes, to ensure consistency of the evaluations, all foreign currency proposals will be converted to Canadian dollars, GST/HST excluded.

Individual resources proposed from responsive bids will be ranked in ascending order of evaluated prices, with the individual resource with the lowest evaluated cost per rated point being ranked first. The two (2) highest ranked resources will be recommended for award of contract. Canada may award one (1) or two (2) contracts in order to meet the requirement for two (2) resources. Should only one (1) resource be ranked, Canada may award only one (1) contract for that resource only. In the event that two or more resources have the same cost per rated point, these resources will be ranked in descending order based on their total points awarded in the Rated Criteria Section, with the resource awarded the most points being ranked the highest.

3.1 Cost of the proposal calculation: The cost per rated point will be calculated as follows:

The Cost-per-Point, taken to the second decimal, will be determined as follows:

$$\text{COST-PER-POINT} = \frac{\text{The Total Cost Proposed}}{\text{Total Points Scored in Rated Requirements}}$$

4. Selection Methodology

4.1 Up to two (2) contracts, if awarded, will be awarded to the responsive Bidder (s) that offers quality services and experience at the Best Value to the Crown. Best Value is defined as the lowest cost per point responsive proposal. Bidders may bid on one or both of the resources as specified in Annex A – Statement of Work, but should submit a separate proposal for each resource.

Initial Contract Period (from the date of contract award to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Directives and Policy Advisor	\$	220 days	\$

First Option Period (from the end of the Initial Contract Period to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Directives and Policy Advisor	\$	220 days	\$

Second Option Period (from the end of the First Option Period to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Directives and Policy Advisor	\$	220 days	\$

Total Cost Proposed for the Intelligence Directives and Policy Advisor - Includes the Initial Contract Period and all Option Periods	\$		
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Mandatory and Point Rated Criteria for the Intelligence Exercise Planner and Lessons Learned Coordinator Requirement

Bidders may bid on one or both of the resources as specified in Annex A – Statement of Work, but should submit a separate proposal for each resource.

1. Mandatory Criteria

Responses that clearly demonstrate that all of the mandatory criteria have been met will be evaluated further. It is the bidder's responsibility to clearly demonstrate that all of the mandatory criteria are met. Responses failing to do so will be ruled non-responsive and will not be considered further.

Bidders are encouraged to supply as much information as necessary to demonstrate clearly that the mandatory requirements are met and to ensure evaluated criteria can be properly assessed.

1.1 Mandatory Criteria

VENDOR'S FACILITY

MANDATORY CRITERIA		PROPOSAL REFERENCE
M1a	The Bidder must hold a valid Facility Security Clearance (FSC) at the TOP SECRET level issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC) at bid closing. <i>This shall be demonstrated by including a copy of the clearance <u>letter</u> issued to the firm by PWGSC/CISD or by providing the organization screening number as provided by PWGSC/CISD</i>	

INTELLIGENCE EXERCISE PLANNER AND LESSONS LEARNED COORDINATOR

MANDATORY CRITERIA		PROPOSAL REFERENCE
M1c	The Bidder must clearly demonstrate that its proposed resource possesses a valid TOP SECRET SIGINT security clearance for the duration of the contract. <i>This shall be demonstrated by including the following information:</i> <ul style="list-style-type: none"> • Name of the individual; • Level of security clearance obtained; • Expiry date; and • Security Screening Certificate and Briefing Form file number. 	
M2c	The Bidder must clearly demonstrate that its proposed resource has been indoctrinated SPECIAL ACCESS within the past five years. <i>This shall be demonstrated by including a written confirmation.</i>	
M3c	The Bidder must clearly demonstrate that within the past 10 years its proposed resource has prepared and delivered a minimum of five (5) presentations to senior management (defined to be, at a minimum, the EX minus 1 level with the Public Service, LCol rank in the Canadian Armed Forces or VP level in private industry).	
M4c	The Bidder must clearly demonstrate that its proposed resource has a minimum of 24 months of experience, within the past 8 years, preparing military, emergency preparedness, immediate response or other type of high intensity (defined as 24/7) training or exercise plans for large military or other government organizations (defined as more than 250 personnel).	
M5c	The Bidder must clearly demonstrate that its proposed resource has a minimum of 12 months of experience, within the past eight (8) years, preparing strategic and / or operational plans (defined as plans dealing with any of the following: transportation,	



	deployment, intelligence, training, logistics support and maintenance support activities) in support of high intensity (defined as 24/7) operations.	
M6c	The Bidder must clearly demonstrate that its proposed resource has a minimum of 12 months of combined experience in all of the following: <ul style="list-style-type: none"> • Leading and managing operational activities (including operational support activities); • Providing intelligence advice to senior management in the military or within other government departments; and • Developing intelligence support concepts and implementation plans. 	
M7c	The Bidder must clearly demonstrate that its proposed resource has a minimum of 24 months of experience in the review and analysis of intelligence documentation. Intelligence is defined as scientific, technical, tactical, diplomatic or sociological reports and briefings dealing with broad issues such as economics, political assessments, military capabilities and intentions of foreign nations or ethnic groups.	
M8c	The Bidder must clearly demonstrate that its proposed resource has a minimum of 24 months of experience working with one or more Canadian Defence Intelligence organizations at the strategic or operational level, including CDI, the operational commands J2 staffs (CJOC, CANSOFCOM or, previous to the amalgamation, CEFCOM, Canada COM or CANOSCOM), and the J2 staff of the environmental Chiefs of Staff in the area of lessons learned (this encompasses the analysis of After Action Reports following exercises or operations, and any activity to identify lessons learned and suggest corrective action).	
M9c	The Bidder must clearly demonstrate that its proposed resource has acquired a minimum of 48 months of applied knowledge and skills from working with level II and level III Canadian classified systems (examples include but are not limited to CSNI and SPARTAN).	

Only those bids meeting all of the Mandatory Qualifications will be considered further. It is imperative that all indicated qualifications and experience are fully demonstrated and supported in the proposal to be declared responsive. Simply listing or stating that a qualification or experience exists will not suffice for the purposes of demonstrated.

2. Rated Criteria

Proposals meeting all Mandatory Criteria will be further evaluated against the Rated Criteria shown below. It is the bidder's responsibility to ensure that sufficient information is provided to properly evaluate these criteria. Such information could include, but is not limited to resumes, company profile, company history, proposed work plan, breakdown of level of effort, description of methodology and references. See Annex B Section B2 Evaluation of Proposals.

The following are the RATED CRITERIA. Points will be allocated for each Rated Criteria as shown.

2.1 Rated Criteria

INTELLIGENCE EXERCISE PLANNER AND LESSONS LEARNED COORDINATOR

Item	Requirement	Maximum Points	Rating Scale	Proposal Reference
R1c	The Bidder should clearly demonstrate that its proposed resource has experience, within the past 8 years, preparing military, emergency preparedness, immediate response or other type of high intensity (defined as 24/7) training or exercise plans for large	36	1 point per month beyond the mandatory 24 months (M4c)	



Item	Requirement	Maximum Points	Rating Scale	Proposal Reference
	military or other government organizations (defined as more than 250 personnel).			
R2c	The Bidder should clearly demonstrate that its proposed resource has experience, within the past eight (8) years, preparing strategic and / or operational plans (defined as plans dealing with transportation, deployment, intelligence, training, logistics support and maintenance support activities) in support of high intensity (defined as 24/7) operations.	24	1 point per month beyond the mandatory 12 months (M5c)	
R3c	The Bidder should clearly demonstrate that its proposed resource has experience in the review and analysis of intelligence documentation. Intelligence is defined as scientific, technical, tactical, diplomatic or sociological reports and briefings dealing with broad issues such as economics, political assessments, military capabilities and intentions of foreign nations or ethnic groups.	30	1 point per month beyond the mandatory 24 months (M7c)	
R4c	The Bidder should clearly demonstrate that its proposed resource has experience in the following: <ul style="list-style-type: none"> • Leading and managing operational activities (including operational support activities); • Providing intelligence advice to senior management in the military or within other government departments; and • Developing intelligence support concepts and implementation plans. 	24	1 point per month of combined experience beyond the mandatory 12 months (M6c)	
R5c	The Bidder should clearly demonstrate that its proposed resource has experience working with one or more Canadian Defence Intelligence organizations at the strategic or operational level, including CDI, J2 staff of operational commands, and J2 staff of the environmental Chiefs of Staff in the area of lessons learned (this encompasses the analysis of After Action Reports following exercises or operations, and any activity to identify lessons learned and suggest corrective action).	18	1 point per month beyond the mandatory 12 months (M8c)	



Item	Requirement	Maximum Points	Rating Scale	Proposal Reference
	Total Points Available:	132		

3. Financial Proposal

Financial Proposals are to be submitted in a document separate from the Technical Proposal.

Bidders shall propose Firm Fixed Per Diem Rates, exclusive of GST/HST, as per the Table below. It is mandatory that the Bidders include the following (or similar) grid as part of their financial proposal. It is the Bidder's responsibility to account for any other costs not explicitly stated in the financial grid below.

For evaluation purposes, to ensure consistency of the evaluations, all foreign currency proposals will be converted to Canadian dollars, GST/HST excluded.

Individual resources proposed from responsive bids will be ranked in ascending order of evaluated prices, with the individual resource with the lowest evaluated cost per rated point being ranked first. The two (2) highest ranked resources will be recommended for award of contract. Canada may award one (1) or two (2) contracts in order to meet the requirement for two (2) resources. Should only one (1) resource be ranked, Canada may award only one (1) contract for that resource only. In the event that two or more resources have the same cost per rated point, these resources will be ranked in descending order based on their total points awarded in the Rated Criteria Section, with the resource awarded the most points being ranked the highest.

3.1 Cost of the proposal calculation: The cost per rated point will be calculated as follows:

The Cost-per-Point, taken to the second decimal, will be determined as follows:

$$\text{COST-PER-POINT} = \frac{\text{The Total Cost Proposed}}{\text{Total Points Scored in Rated Requirements}}$$

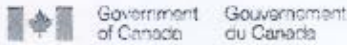
4. Selection Methodology

4.1 Up to two (2) contracts, if awarded, will be awarded to the responsive Bidder (s) that offers quality services and experience at the Best Value to the Crown. Best Value is defined as the lowest cost per point responsive proposal. Bidders may bid on one or both of the resources as specified in Annex A – Statement of Work, but should submit a separate proposal for each resource.

Initial Contract Period (from the date of contract award to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Exercise Planner and Lessons Learned Coordinator	\$	220 days	\$
First Option Period (from the end of the Initial Contract Period to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Exercise Planner and Lessons Learned Coordinator	\$	220 days	\$
Second Option Period (from the end of the First Option Period to one year later)			
	Per Diem Rate (7.5 hours per day)	Estimated level of effort	Total
Intelligence Exercise Planner and Lessons Learned Coordinator	\$	220 days	\$
Total Cost Proposed for the Intelligence Exercise Planner and Lessons Learned Coordinator - Includes the Initial Contract Period and all Option Periods			\$



Formerly W8424-13-8130



Contract Number / Numéro du contrat DND 13/0000538
Security Classification / Classification de sécurité UNCLASSIFIED

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine DND/CJOC HQ	2. Branch or Directorate / Direction générale ou Direction J2	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Update, develop, structure CJOC intelligence directives and policies, coordinate their implementation and provide senior-level advice and assistance to J2 CJOC, and provide intelligence input to the CJOC training exercise program and develop, track and integrate intelligence lessons learned and provide advice and follow up on related decisions.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input checked="" type="checkbox"/>	Foreign / Étranger <input checked="" type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input checked="" type="checkbox"/>		
Restricted to / Limité à : <input type="checkbox"/>	Restricted to / Limité à : <input checked="" type="checkbox"/>	Restricted to / Limité à : <input checked="" type="checkbox"/>
Specify country(ies) / Préciser le(s) pays : Embbed contractor Canadian Citizenship CEO nro CC	Specify country(ies) / Préciser le(s) pays : Can/Usen	Specify country(ies) / Préciser le(s) pays : Can/Usen
7. c) Level of Information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input checked="" type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input checked="" type="checkbox"/>	NATO SECRET / NATO SECRET <input checked="" type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input checked="" type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input checked="" type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input checked="" type="checkbox"/>



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat

DND13/0000538

Security Classification / Classification de sécurité
UNCLASSIFIED

PART A (continued) / PARTIE A (suite)

6. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité: TOP SECRET SIGINT

7. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document:

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input checked="" type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/> SECRET SECRET	<input checked="" type="checkbox"/> TOP SECRET TRÈS SECRET
<input checked="" type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input checked="" type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input checked="" type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	Special comments: Commentaires spéciaux: _____		

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

PART C - PROTECTION (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

Contract Number / Numéro du contrat

DND13/0000538

Security Classification / Classification de sécurité

UNCLASSIFIED

PART D (continued) / PARTIE C (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ		NATO				CONSEC							
	A	B	C	CONFIDENTIAL Confidentiel	SECRET Secret	TOP SECRET Très Secret	NATO Restricted NATO OPPOSITION Restrictions	NATO CONFIDENTIAL NATO CONFIDENTIEL	NATO SECRET	CONSEC TOP SECRET CONFIDENTIAL Très Secret	PROTECTED Protégé			CONFIDENTIAL Confidentiel	SECRET Secret	TOP SECRET Très Secret	
											A	B	C				
Information / Infos Renseignements / Biais Productions																	
IT Media / Support TI																	
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Security Requirement Checklist (SRCL) Supplemental Security Guide DND13/0000538

Part A - Multiple Release Restrictions: Security Guide							
To be completed in addition to SRCL question 7.b) when release restrictions are therein identified. Indicate to which levels of information release restrictions apply. Make note in the chart if a level of information bears multiple restrictions (e.g. a portion of the SECRET information bears the caveat Canadian Eyes Only while the remainder of the SECRET information has no release restrictions.)							
Canadian Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions			X				
Not Releasable							
Restricted to:				Canadian Citizen	Canadian Citizen	Canadian Citizen	Canadian Citizen
Permanent Residents Included*							
NATO Information							
Citizenship Restriction	NATO UNCLASSIFIED	NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET		
All NATO Countries							
Restricted to:					Canadian Citizen		
Permanent Residents Included*							
Foreign Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions							
Restricted to :							Canadian Citizen
Permanent Residents Included*							
COMSEC Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
Not Releasable							
Restricted to:							Canadian Citizen
DND ONLY Embedded Contractor (Access to Controlled Goods)							
Restriction	Yes			NO			
SECRET clearance with CEO applies	Yes, Canadian Citizen						

*When release restrictions are indicated, specify if permanent residents are allowed to be included.



Security Requirement Checklist (SRCL) Supplemental Security Guide
DND13/0000538

Part B - Multiple Levels of Personnel Screening: Security Classification Guide			
To be completed in addition to SRCL question 10.a) when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract.			
Level of Personnel Clearance (e.g. Reliability, Secret)	Position / Description/Task	Access to sites and/or information. Levels of Information to be accessed.	Citizenship Restriction (if any)
TOP SECRET (SIGINT)	Intelligence Advisor	Yes, TOP SECRET (SIGINT) and NATO Secret	Canadians Only
TOP SECRET (SIGINT)	Intelligence Advisor	Yes, TOP SECRET (SIGINT) and NATO Secret	Canadians Only

Part C – Safeguards / Information Technology (IT) Media – 11d = yes
IT security requirements must be specified in a separate technical document and submitted with the SRCL

OTHER SECURITY INTRUCTIONS

Insert instructions



National
Defence

Défense
nationale

REQUEST FOR PROPOSAL (RFP)
Special Intelligence Advisors
DND 13/0000538– Annex C
Security Requirements Checklist (SRCL)
and Security Classification Guide

Page 6 of 6

SRCL signature page to be inserted at contract award



APPENDIX '1' TO RFP DND 13/0000538

FEDERAL CONTRACTORS PROGRAM

1. The Federal Contractors Program for Employment Equity (FCP-EE) requires that some organizations bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity, as a condition precedent to the award of a Contract. If the bidder is subject to the Program, evidence of its commitment must be provided prior to the award of any contract.

Contractors that have been declared "Ineligible Contractors" by the Department of Human Resources and Skills Development (HRSD) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contract Regulations* (currently at \$25,000, including all applicable taxes), either as a result of a finding of non-compliance by HRSD, or following their voluntary withdrawal from the Program for a reason other than the reduction in their workforce. Any bid from ineligible contractors will not be considered for award.

2. The Bidder certifies its status with FCP-EE, as follows:

The Bidder

- (a) () is not subject to FCP-EE, having a workforce of less than 100 permanent full or part-time employees in Canada,
- (b) () is not subject to FCP-EE, being a regulated employer under the *Employment Equity Act*;
- (c) () is subject to the requirements of FCP-EE, having a workforce of 100 or more permanent full or part-time employees in Canada, but has not previously obtained a certificate number from HRSD, (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is provided herewith (attached);
- (d) () is subject to FCP-EE, and has a valid certification number as follows: _____
(e.g. has not been declared "Ineligible Contractor" by HRSD).

3. If the Bidder does not fall within the exceptions enumerated in 2. (a) or (b), the Program requirements do apply, and as such, the Bidder is required to submit HRSD form LAB 1168, Certificate of Commitment to Implement Employment Equity, DULY SIGNED or a valid Certificate number confirming its adherence to the FCP-EE.

4. The Bidder acknowledges that the Minister shall rely on this certification to award the Contract. Should a verification by the Minister disclose a misrepresentation on the part of the Bidder, the Minister shall have the right to treat any contract resulting from this bid as being in default, and to terminate it pursuant to the Default provisions of the Contract.

5. In all cases, the Bidder is required to produce evidence or supporting information on demand prior to award of a contract, if such evidence is not included with its bid.

Signature of authorized representative: _____.



APPENDIX '2' TO RFP DND 13/0000538

**Authorization and Availability Certification for
Resources who are not Employees of the Bidder**

Should the Bidder be requested to provide services to Canada under any Contract awarded as a result of the solicitation referenced below, I _____ (*insert proposed resource name*), certify that I consent to my resume being submitted by _____ (*insert Bidder name*) in response to RFP no. DND13/0000538 and that I have (or my employer has, on my behalf) entered into an agreement with the Bidder to provide services described in the RFP and/or the proposal submitted by the Bidder to Canada and that I be available as required by Canada.

Signature of Proposed Resource: _____

Date: _____

NOTE TO BIDDER: *This Appendix must be provided by the Bidder if requested by the Contracting Authority.*



APPENDIX '3' TO RFP DND 13/0000538

FORMER PUBLIC SERVANT CERTIFICATION

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.

Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S., 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?
Yes () No ()



If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including Applicable Taxes.

Name of Authorized Representative

Signature

Date



APPENDIX '4' TO RFP DND 13/0000538

NON-DISCLOSURE AGREEMENT

The Contractor shall not, without the prior written permission of the Contract Authority, disclose to anyone, other than an employee or a subcontractor with a need to know, the information or documentation it has access to during the performance of the Work under the Contract. Prior to commencing the Work under the Contract, the Contractor shall require its employees or subcontractors who will be performing Work under the Contract or who are provided access to the Work to sign a Statement of Non-Disclosure substantially in the form set out below.

Non-Disclosure Statement Agreement

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Number DND 13/0000538 between Her Majesty The Queen in Right of Canada, represented by the Minister of National Defence and _____ [*Name of the Contractor*], including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labelled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not re-produce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Number:
DND 13/0000538.

Signature

Date



APPENDIX '5' TO RFP DND 13/0000538

REQUIREMENTS PRECEDENT TO TASK AUTHORIZATION APPROVAL

1. STATUS AND AVAILABILITY OF RESOURCES

The Contractor certifies that every individual proposed in its Task Authorization (TA) response will be available to perform the Work as required by Canada's representatives and at the time specified in the TA or agreed to with Canada's representatives. If for reasons beyond its control, the Contractor is unable to provide the services of an individual named in its TA response, the Contractor may propose a substitute with similar qualifications and experience. The Contractor must advise the Procurement Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Contractor: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause, or termination of an agreement for default.

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Contractor must, upon request from the Procurement Authority, provide a written confirmation, signed by the individual, of the permission given to the Contractor and of his/her availability.

2. EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material submitted with its TA response, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the TA.

3. TECHNICAL CRITERIA

Résumés for Proposed Resources: Résumés must be provided for the consultant(s) identified in the TA that demonstrate that each proposed individual meets the qualification requirements described in Annex B – Evaluation Criteria and Selection Methodology. Résumés should state the current level of personnel security held by the consultant(s) and their corresponding Canadian Industrial Security Directorate (CISD) file number(s).

Education: Academic Certification (Degree, etc) must be obtained through a recognized academic institution in the field of expertise.

The consultant(s) proposed must meet the education requirements for the Consultant Category for which they are being proposed. Where the Contract requests the Supplier to provide information about the education of the proposed individual(s), the individual(s) must have obtained its education from a recognized* Canadian university, college or high school, or the equivalent as established by a recognized* Canadian academic credentials assessment service, if obtained outside Canada.

*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following Internet link: <http://www.cicic.ca/indexe.stm>.