

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:
Bid Receiving - PWGSC / Réception des
soumissions - TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage, Phase III
Core 0B2 / Noyau 0B2
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION

**Proposal To: Public Works and Government
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Comments - Commentaires

Title - Sujet Public Opinion Research	
Solicitation No. - N° de l'invitation EP363-140002/B	Date 2015-01-02
Client Reference No. - N° de référence du client EP363-14-0002	
GETS Reference No. - N° de référence de SEAG PW-\$\$CY-016-66465	
File No. - N° de dossier cy016.EP363-140002	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-02-27	
Time Zone Fuseau horaire Eastern Standard Time EST	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Schou, Christian	Buyer Id - Id de l'acheteur cy016
Telephone No. - N° de téléphone (613) 995-2278 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF PUBLIC WORKS AND GOVERNMENT SERVICES CANADA 5TH FL. 350 ALBERT ST. OTTAWA Ontario K1A0S5 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication
360 Albert St./ 360, rue Albert
12th Floor / 12ième étage
Ottawa
Ontario
K1A 0S5

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

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REQUEST FOR PROPOSAL EP363-140002/B
FOR
PUBLIC OPINION RESEARCH

**REQUEST FOR STANDING OFFERS – RFSO
FOR
PUBLIC OPINION RESEARCH (POR)**

This Standing Offer excludes deliveries destined to addresses located in the Comprehensive Land Claims Agreement(s) (CLCA) areas.

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PART 1 GENERAL INFORMATION

1.1 INTRODUCTION

This Request for Standing Offer (RFSO) is divided into six parts plus annexes and appendices, as follows:

- | | |
|--------|--|
| Part 1 | General Information: provides a general description of the requirement; |
| Part 2 | Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO; |
| Part 3 | Offer Preparation Instructions: provides Offerors with instructions on how to prepare their offer to address the evaluation criteria specified; |
| Part 4 | Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the offer, and the basis of selection; |
| Part 5 | Certifications: includes the certifications to be provided; |
| Part 6 | 6A, Standing Offer, and 6B, Resulting Contract Clauses:

6A, includes the Standing Offer from the Offeror and the applicable clauses and conditions;

6B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer. |

The Annexes and Appendices are listed in the Table of Contents.

1.2 SUMMARY

This RFSO is for the provision of public opinion research (POR) services to be conducted for various Government of Canada departments and agencies. The RFSO has been designed to encourage the participation of all types of suppliers of POR including those that are small, medium or large businesses, joint ventures, and businesses specialized in terms of target populations, geographic scope, subject areas or methodology.

Offerors can choose to submit an offer for any or all of the following separate POR series (as indicated below).

1. Series A – Fieldwork and Data Tabulation for Online Surveys (Annex “A1”);
2. Series B – Fieldwork and Data Tabulation for Telephone Surveys (Annex “A2”);
3. Series C – Qualitative Research (Annex “A3”);
4. Series D – Quantitative Research (Annex “A4”);

Note:

Offerors who submit an offer for both Series C and Series D, will be considered for Series E – Qualitative and Quantitative Research. (Annex “A5”).

Definition of Public Opinion Research (POR)

Resulting Standing Offers, will be used for projects falling under the Treasury Board definition of Public Opinion Research described in the Communications Policy of the Government of Canada <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316§ion=text#sec5.8>. Within this definition, Government of Canada POR is defined as follows:

"...the planned gathering, by or for a government institution of opinions, attitudes, perceptions, judgments, feelings, ideas, reactions, or views that are intended to be used for any government purpose, whether that information is collected from persons (including employees of government institutions), businesses, institutions or other entities, through quantitative or qualitative methods, irrespective of size or cost."

The broad definition includes any aspect of POR including activities such as the design and testing of a collection method and tools, as well as the sampling, gathering, inputting, coding and primary analysis of data, and online panel development and management.

Offerors are also encouraged to consult the Procedures for the Management of Public Opinion Research (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28033>) for further details of the process departments and agencies are required to follow.

1.3 STANDING OFFERS

A Standing Offer (SO) is an offer from a supplier to Canada that allows Canada to purchase goods and/or services, or a combination of goods and services, as and when requested, during a specific period of time, through the use of a call-up process which incorporates the conditions and pricing of the Standing Offer.

A Standing Offer itself is not a contract. A separate contract is formed each time using the call-up process for the provision of goods and/or services against the qualified suppliers of the Standing Offer. When a call-up is made, it constitutes an unconditional acceptance by Canada of the supplier's offer for the provision, to the extent specified, of the goods and/or services described in the Standing Offer. Individual call-ups awarded against the Standing Offer must not exceed **\$250,000.00** (including applicable taxes).

Five (5) separate lists of qualified suppliers will be established for the provision of Public Opinion Research Services.

A maximum of ten (10) Departmental Individual Standing Offers (DISOs) for each series may result from this Solicitation.

The period of the Standing Offer will be from date of award to March 31, 2018 with the possibility of three (3) additional one (1) year option periods under the same terms and conditions.

Offerors may submit an offer for either Series A, Series B, Series C, and/or Series D. Offerors who submit an offer for Series C and Series D will automatically be considered for Series E. However, Offerors must clearly indicate which series of service they are providing an offer for. Proposals will be assessed separately for each series and SOs will be awarded to Offerors who achieve the highest scores for the combined technical merit and price for each series.

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The Series are:

Series A – Fieldwork and Data Tabulation for Online Surveys

(See details of the Statement of Work at Annex “A1”).

Series B – Fieldwork and Data Tabulation for Telephone Surveys

(See details of the Statement of Work at Annex “A2”).

Series C – Qualitative Research

(See details of the Statement of Work at Annex “A3”).

Series D – Quantitative Research

(See details of the Statement of Work at Annex “A4”).

Series E – Qualitative and Quantitative Research

(See details of the Statement of Work at Annex “A5”).

1.4 DEBRIEFINGS

Offerors may request a debriefing on the results of the Request for Standing Offers process. Offerors should make the request to the Standing Offer Authority within **15 working days** of receipt of the results of the Request for Standing Offers process. The debriefing may be in writing, by telephone or in person.

PART 2 OFFEROR INSTRUCTIONS

2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

The 2006 (2014/09/25) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of 2006, Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days
Insert: one hundred and eighty (180) days

2.1.1 SACC Manual Clauses

NUMBER	DATE	DESCRIPTION
A3050T	2010-01-11	Canadian Content Definition
M9033T	2011-05-16	Financial Capability

2.2 SUBMISSION OF OFFERS

Offers must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated below:

Offers must be submitted by 2:00 pm Eastern Standard Time on Friday, February 6th, 2015 to:

Bid Receiving
Department of Public Works and Government Services
Bid Receiving Unit
Portage III, 0B2
11 Laurier Street
Gatineau, Quebec
For couriers: J8X 4A6 For regular mail: K1A 0S5
Telephone (819) 956-3370

Due to the nature of the Request for Standing Offers, transmission of offers by facsimile or electronic mail to PWGSC will not be accepted.

2.3 FORMER PUBLIC SERVANT

Contracts awarded to 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, Offerors must provide the information required below before the issuance of a Standing Offer.

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 Offeror a FPS in receipt of a pension? **YES () NO ()**

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

- (1) name of former public servant;
- (2) date of termination of employment or retirement from the Public Service.

By providing this information, Offerors agree that the successful Offeror'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 Adjustment Directive

Is the Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **YES () NO ()**

If so, the Offeror must provide the following information:

- (1) name of former public servant;
- (2) conditions of the lump sum payment incentive;
- (3) date of termination of employment;
- (4) amount of lump sum payment;
- (5) rate of pay on which lump sum payment is based;
- (6) period of lump sum payment including start date, end date and number of weeks;
- (7) number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment 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.

2.4 ENQUIRIES – REQUEST FOR STANDING OFFERS

All enquiries must be submitted in writing to the Standing Offer Authority **no later than ten (10) calendar days before the Request for Standing Offers (RFSO) closing date**. Enquiries received after that time may not be answered.

Offerors should reference as accurately as possible the numbered item of the RFSO to which the enquiry relates. Care should be taken by Offerors to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that Offerors do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Offerors. Enquiries not submitted in a form that can be distributed to all Offerors may not be answered by Canada.

2.5 APPLICABLE LAWS

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

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

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2.6 BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY

The Department of Public Works and Government Services has determined that any intellectual property rights arising from the performance of the work under the resulting contract will belong to Canada as the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

PART 3 OFFER PREPARATION INSTRUCTIONS

3.1 OFFER PREPARATION INSTRUCTIONS

Canada requests that Offerors provide their offer in separately bound sections as follows:

- Section I: Technical Offer (five (5) hard copies and one (1) soft copy on CD or USB key)
- Section II: Financial Offer (one (1) hard copy and one (1) soft copy on CD or USB key)
- Section III: Certifications (one (1) hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial offer only. No prices must be indicated in any other section of the offer.

Canada requests that Offerors follow the format instructions described below in the preparation of their offer.

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to that of the Request for Standing Offers.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, Offerors should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

Section I: Technical Offer

In their technical offer, Offerors should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Where an Offeror is submitting an offer for more than one series, the Offeror may submit only one offer, however, the Offeror must address all requirements separately for each series.

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex "B", Basis of Payment. The total amount of applicable taxes must be shown separately.

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Section III: Certifications

Offerors must submit the certifications required under Part 5.

3.2 OFFEROR'S PROFILE

Shortly after the issuance of the Standing Offers, the Standing Offer holders will be requested to submit further documentation of their project experience and expertise in order to assist the Government of Canada departments and agencies to select appropriate suppliers for individual projects.

PART 4 EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 EVALUATION PROCEDURES

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers (RFSO) including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.

4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are fully described in Annex "C".

4.1.2 Financial Evaluation

Financial evaluation criteria are fully described in Annex "C".

4.2 BASIS OF SELECTION

4.2.1 To be declared responsive, an offer must:

- (a) comply with all the requirements of the Request for Standing Offers; and
- (b) meet all mandatory technical criteria; and
- (c) obtain the required minimum of 80 percent of the available points for each rated criteria per Series. The only exception will be the Environmental Attributes rated requirement where there is no minimum requirement. As each Series is performed on a different scale, please refer to Annex "C".

4.2.2 Offers not meeting (a), (b) and (c) will be declared non-responsive.

4.2.3 The evaluation will be based on the highest responsive combined rating of technical merit and price. The ratio will be **80%** for the technical merit and **20%** for the price.

4.2.4 To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **80%**.

4.2.5 To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of **20%**.

4.2.6 For each responsive offer, the technical merit score and the pricing score will be added to determine its combined rating.

4.2.7 Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Series, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer for each Series.

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PART 5 CERTIFICATIONS

Offerors must provide the required certifications and associated information to be issued a Standing Offer.

The certifications provided by Offerors to Canada are subject to verification by Canada at all times. Canada will declare an offer non-responsive, will have the right to set-aside a Standing Offer, or will declare a contractor in default in carrying out any of its obligations under any resulting contracts, if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority may render the Offer non-responsive, may result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 CERTIFICATIONS REQUIRED PRECEDENT TO ISSUANCE OF A STANDING OFFER AND CERTIFICATIONS REQUIRED WITH THE OFFER

5.1.1 Certifications Required Precedent to Issuance of a Standing Offer

The certifications listed below should be completed and submitted with the offer, but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Standing Offer Authority will inform the Offeror of a time frame within which to provide the information. Failure to comply with the request of the Standing Offer Authority and to provide the certifications within the time frame provided will render the offer non-responsive.

5.1.1.1 Integrity Provisions - Associated Information

By submitting an offer, the Offeror certifies that the Offeror and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Offer of Standard Instructions 2006. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

5.1.1.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml) available from [Employment and Social Development Canada-Labour's](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml) website.

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equality/eq/emp/fcp/list/inelig.shtml)" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

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5.1.2 Certifications Required with the Offer

Offerors must submit the following duly completed certification with their offer:

5.1.2.1 Canadian Content Certification

5.1.2.1.1 SACC *Manual* clause A3050T (2010-01-11) Canadian Content Definition

This procurement is limited to Canadian services.

The Supplier certifies that:

() the service offered is a Canadian service as defined in paragraph 4 of clause A3050T.

Signature

Date

5.1.2.2 Education and Experience

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate.

Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

Signature

Date

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5.1.2.3 Status and Availability of Resources

The Offeror certifies that, should it be issued a Standing Offer as a result of the Request for Standing Offers, every individual proposed in its offer will be available to perform the Work resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer 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 Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror 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 Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability. Failure to comply with the request may result in the offer being declared non-responsive.

Signature

Date

5.1.2.4 Official Language Certification

The Offeror certifies that all the fieldwork conducted in response to the Request for Standing Offer (RSFO) for Public Opinion Research services will be conducted in the official language of the respondent supervised by bilingual personnel. Where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, a transfer or call-back will be made within 20 minutes of the initial call. This would apply unless the respondent prefers a call-back at a time that was more convenient for them or the survey is required in a language other than English or French.

Signature

Date

**PART 6
STANDING OFFER AND RESULTING CONTRACT CLAUSES**

This Standing Offer excludes deliveries destined to addresses located in Comprehensive Land Claims Agreement(s) (CLCA) areas.

A. STANDING OFFER

6.1 OFFER

6.1.1 The Offeror offers to fulfill the requirement in accordance with the Statement of Work at Annex "A".

6.2 STANDARD CLAUSES AND CONDITIONS

All clauses and conditions identified in the Standing Offer and resulting contract(s) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

6.2.1 General Conditions

2005 (2014/09/25) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

6.3 TERM OF STANDING OFFER

6.3.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from date of authorization to March 31, 2018.

6.3.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for up to three (3) additional one (1) year periods.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority at least **thirty (30) days before the expiry date** of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

6.4 AUTHORITIES

6.4.1 Standing Offer Authority

The Standing Offer Authority will be identified upon issuance of the Standing Offer.

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, this individual is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

6.4.2 Technical and Coordinating Authority

The Public Opinion Research Directorate (PORD) of PWGSC is the Government of Canada's Technical and Coordinating Authority for public opinion research.

6.4.3 Project Authority

The project authority will be identified in each call-up against the Standing Offer.

The project authority is the representative of the department or agency for whom the work will be carried out pursuant to a call-up against the Standing Offer.

6.4.4 Standing Offer Holder's Representative

The Offeror has designated the following representative as the central point of contact for all matters pertaining to the Standing Offer:

(The Standing Offer Holder's Representative will be identified upon issuance of the Standing Offer)

6.5 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

6.6 IDENTIFIED USERS

The Identified User authorized to make call-ups against the Standing Offer is:

Public Works and Government Services Canada
Acquisitions Branch
Communication Procurement Directorate
360 Albert St., 12th floor
Ottawa, Ontario K1A 0S5

6.7 PROCEDURES FOR USING THE STANDING OFFERS

6.7.1 Selection of Suppliers for call-ups

This procurement process is designed to allow the Government of Canada to efficiently call up suppliers that are prequalified in the research series. The most appropriate supplier for each project will be determined by departments/agencies on a case-by-case basis. The departments/agencies will be required to provide a written justification for their selection of supplier. To assist departments and agencies in selecting the most appropriate series and supplier for each project, they will have access to the financial information contained in the Standing Offers, Offeror's profile, as well as advice from the Public Opinion Research Directorate (PORD).

When a project is determined to be in more than one research series, the selection of supplier will be limited to those holding Standing Offers in all the applicable series.

The selected supplier will be required to provide a proposal that is satisfactory to the Project Authority and is in accordance with the Basis of Payment of the supplier's Standing Offer.

6.7.2 Call-up Procedures

The Contracting Authority will issue call-ups in accordance with the following procedures:

- The project authority will provide the Offeror with a Statement of Work to be performed. The Offeror will submit a project estimate and proposal in response to the work outlined in the statement of work to the project authority.
- The project estimate will be established by applying the applicable rates detailed in the firm's Basis of Payment. The proposal must provide a breakdown of the level of effort and the associated costs in accordance with the Offeror's Basis of Payment.
- The project authority will forward the project estimate and proposal to the Public Opinion Research Directorate (PORD), which after review, will issue a registration number.
- The Offeror will be authorized by the contracting authority to proceed with the work by the issuance of a call-up.
- The Offeror must not undertake any of the specified work until a call-up is issued by the contracting authority.

6.7.3 Proposal Documentation

For each call-up, the Offeror shall prepare a detailed proposal that will form the basis of the call-up. The Standards for the Conduct of Government of Canada Public Opinion Research (telephone and online surveys) describe elements which are required in proposal documentation. In the absence of Government of Canada standards for qualitative research, the following elements shall be addressed in the proposal, where applicable:

- statement of purpose, objectives and topic / issues areas;
- detail the information needs/research questions that the research will address;
- describe the firm's understanding of the problem / issues to be investigated and how the Government of Canada will use this information;
- detailed description of the methodology and target audiences;
- rationale for the approach and justification of the scope (e.g. number of groups/interviews and location) and design choices;
- recruitment method (random, recruiter or departmental lists, broker rental lists, etc.) and recruitment procedures and confirmation to ensure presence of qualified participants;
- details on sampling methods and procedures, including if applicable composition and descriptions of online panels;
- details on any incentives/honoraria, including rationale;

- description of how the rights of participants will be respected, including if relevant the rights of children, youth and vulnerable participants;
- information about the recruiter(s);
- any technological requirements, including requirements for audio/video taping, and simultaneous translation;
- information on test materials;
- analytical requirements;
- briefly describe how the data will be analyzed related to the objectives / research questions, including any special analyses;
- detailed deliverables, including outline and format of final report; number of CDs and hard copies required for the final report;
- a detailed project schedule with dates and responsibilities for project milestones;
- the names and roles of the team members involved in the project; and
- detailed costing in accordance with the Basis of Payment of the respective SO.

6.8 IDENTIFICATION OF THE FIELDWORK SUB-CONTRACTOR

If a sub-contractor is involved, the Authorized Fieldwork Sub-Contractor will be identified within the Standing Offer.

The same sub-contractor will be required to complete all projects for the duration of the Standing Offer unless authorized in writing by Public Works and Government Services Canada (PWGSC).

To replace the Fieldwork Sub-Contractor, the Standing Offer holder must submit all required documentation in accordance with the applicable rated requirements of the Request for Standing Offers (RFSO).

The sub-contractor is:

Name of firm:
Address:
Telephone:
E-mail:

Note: The Standing Offer holder is responsible for assuring the quality of the Sub-Contractor's work.

6.9 ADDING OR REPLACING PERSONNEL

6.9.1 Survey Field Managers (Series A and B only)

To add a Survey Field Manager to the Standing Offer, the Standing Offer holder must submit the name of the proposed individual, their curriculum vitae and relevant work experience to the Standing Offer authority for evaluation. The individual will be evaluated in accordance with applicable rated requirements of the RFSO for the particular series. For Series A – Fieldwork and Data Tabulation for Online Surveys, the applicable rated requirements are RA.1 and RA.2. For Series B – Fieldwork and Data Tabulation for Telephone Surveys, the applicable rated requirements are RB.1 and RB.3. The individual must obtain the minimum pass mark of 80% for each rated criterion in order to be added to the Standing Offer.

6.9.2 Senior Researchers (Series C, D, and E only)

To add a Senior Researcher to the Standing Offer, the Standing Offer holder must submit the name of the proposed individual, their curriculum vitae and relevant work experience to the Standing Offer authority for evaluation. The individual will be evaluated in accordance with the applicable rated requirements of the RFSO for the particular series. For Series C – Qualitative Research, the applicable rated requirements are RC.1 and RC.2. For Series D – Quantitative Research, the applicable rated requirements are RD.1 and RD.2. For Series E, the applicable criteria from Series C or D will be used. The individual must obtain the minimum pass mark of 80% for each rated criterion in order to be added to the Standing Offer.

6.9.3 Client Liaisons (Series C, D, and E only)

To add a Client Liaison to the Standing Offer, the Standing Offer holder must submit the name of the proposed individual, their curriculum vitae and language profile to the Standing Offer authority for evaluation.

6.10 CALL-UP INSTRUMENT

The work will be authorized or confirmed by the Identified User using a “*Call-up Against a Standing Offer*” document.

6.11 LIMITATION OF CALL-UPS

Individual call-ups against the Standing Offer must not exceed **\$ 250,000.00** (applicable taxes included).

6.12 PRIORITY OF DOCUMENTS

If there is a discrepancy between the wording of any documents that appear on the following list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the call up against the Standing Offer, including any annexes;
- (b) the articles of the Standing Offer;
- (c) the general conditions 2005 (2014/09/25), General Conditions - Standing Offers - Goods or Services;
- (d) The supplemental general conditions 4008 (2008/12/12), Personal Information and A9122C (2008/05/12) Protection and security of data stored in databases;
- (e) the general conditions 2035 (2014/09/25), General Conditions - Higher Complexity - Services;
- (f) Annex “A”, Statement of Work;
- (g) Annex “B”, Basis of Payment;
- (h) the Offeror's offer dated _____

6.13 CERTIFICATIONS

6.13.1 Compliance

The continuous compliance with the certifications provided by the Offeror with its offer and the ongoing cooperation in providing associated information are conditions of issuance of the Standing Offer (SO). Certifications are subject to verification by Canada during the entire period of the SO and of any resulting contract that would continue

beyond the period of the SO. If the Offeror does not comply with any certification, fails to provide the associated information, or if it is determined that any certification made by the Offeror in its offer is untrue, whether made knowingly or unknowingly, Canada has the right to terminate any resulting contract for default and set aside the Standing Offer.

6.13.2 SACC Manual Clauses

<u>NUMBER</u>	<u>DATE</u>	<u>DESCRIPTION</u>
M3800C	2006/08/15	Estimates
M3020C	2010/01/11	Status and Availability of Resources
M3060C	2008/05/12	Canadian Content Certification
W0002D	2000/12/01	Delivery Requirements Outside a Comprehensive Land Claims Settlement Area

6.14 APPLICABLE LAWS

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

6.15 ADMINISTRATION OF STANDING OFFER

6.15.1 Conditions of Holding a Standing Offer

The SO Holder acknowledges that it is a condition of this Standing Offer that:

(a) The SO Holder and its joint venture members, as applicable, must continue to meet all the qualification requirements described in RFSO EP363-140002/B while it has a Standing Offer.

(b) All certifications made in the Offeror's original Offer be true on the date of this Standing Offer and remain true throughout the Standing Offer Period. The Offeror acknowledges that Canada is entitled to verify these certifications throughout the Standing Offer Period.

(c) The Offeror acknowledges that all online projects resulting from Standing Offer are required to meet Government of Canada Web Standards on accessibility and usability and any standards or guidelines developed by the department or agency for whom the work is being performed. The Offeror attests to their capacity to work with departmental officials in testing and troubleshooting the project to meet all applicable standards.

Canada may verify compliance with these conditions at any time during the Standing Offer and failure to meet any of these conditions constitutes grounds for setting aside authority to use this Standing Offer.

6.15.2 On-going Qualification Requirement

(a) The Offeror or joint venture members must immediately notify the Standing Offer Authority if it no longer meets any of the mandatory qualification requirements of this Standing Offer.

(b) PWGSC may require a SO Holder to confirm its qualification at any time. For example the SO Authority may require a SO Holder to provide evidence that:

- i. The insurance it carries continues to meet the requirement EP363-140002/B;

- ii. It continues to have the technical ability and experience required to deliver the services for which it is qualified;
- iii. The joint venture membership, if any, remains as stated in the Standing Offer.

(c) Where the Offeror no longer meets any of the individual requirements for qualification, Canada may reserve the right to:

- i. Put aside the Standing Offer in its entirety until the Offeror has demonstrated that it meets the requirements in respect of which it has been found deficient, during which time the Offeror will not be eligible for call-ups issued under the Standing Offer;
- ii. Put aside the Offeror qualification under a specific Series of the Standing Offer until the SO Holder has demonstrated that it meets the requirements in respect to which it has been found deficient, during which time the Offeror will not be eligible for call-ups issued under the Standing Offer framework for that Series.

6.15.3 Withdrawal of Authority to use Standing Offer

Canada may, at any time, withdraw authority from a Department or an Agency to use this Standing Offer.

6.15.4 Vendor Performance and identified Users Assessment

As stated under the section entitled "On-going Qualification Requirement" above, Canada reserves the right to put aside an Offeror's Standing Offer.

The following is not an exhaustive list of examples of situations which may result in the put aside of the Standing Offer include:

1. Delayed completion of required services;
2. Performance quality (e.g. services rendered not in accordance with the scope of work identified in the call-up);
3. Price revision;
4. Violation of any of the specific terms and conditions detailed in the Standing Offer (e.g. failure to meet the minimum RFSO requirements, failure to respect the contract limitations, etc.);
5. Canada has terminated any contract resulting from the Standing Offer for default
6. Canada has imposed measures on the Offeror under the PWGSC Vendor Performance Corrective Measures Policy (or such similar policy as may be in place from time to time);
7. Distribution or publication of information that conflicts with any aspect of the terms and conditions, pricing, or availability of systems currently listed in this Standing Offer.

6.15.5 Termination of Individual Call-up made under this Standing Offer

If a call-up made under this SO is terminated, such termination does not affect the Standing Offer. The Offeror acknowledges, however, that a default under any contract made under this Standing Offer may result in the termination of this Standing Offer, at the discretion of the Standing Offer Authority.

6.16 NO REPORTING ON ELECTORAL OR POLITICAL PARTY VOTING INTENTIONS OF THE ELECTORATE

The Contractor shall ensure that no written, verbal or electronic reporting to Government of Canada clients will contain information on electoral voting intentions, political party preferences or standings with the electorate or ratings of the performance of a political party or its leaders. The Contractor shall fully comply with the Government of Canada political neutrality requirements.

6.17 CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY

The Department of Public Works and Government Services 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: the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

6.18 FINAL REPORT

The report, specified in Annex "D" section D.5, will be sent to the Librarian and Archivist of Canada in accordance with section 15.1 of the *Library and Archives of Canada Act (2004, c. 11)*. The final report will become part of the public domain. The report must also accord with the Public Opinion Research Contract Regulations. More information on the Public Opinion Research Contract Regulations can be found at:

<http://laws.justice.gc.ca/en/showtdm/cr/SOR-2007-134>.

For a full list of all POR reporting requirements, including the regulations, policies and standards related to POR please consult the *Public Opinion Research Final Report Checklist* which can be found in Annex "E".

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B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

6.1 STATEMENT OF WORK

The Contractor must perform the Work described in the Call-up against the Standing Offer.

6.2 STANDARD CLAUSES AND CONDITIONS

6.2.1 General Conditions

SACC Manual clause 2035 (2014-09-25) - General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

6.3 TERM OF CONTRACT

6.3.1 Period of Contract

The work must be completed in accordance with the call-up against the Standing Offer.

6.4 PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

6.5 PAYMENT

6.5.1 Basis of Payment

The Contractor will be paid in accordance with the attached Annex "B", Basis of Payment, for Work performed pursuant to a Call-up against a Standing Offer and subject to acceptance by the Project Authority.

6.5.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____. Customs duties are included and applicable taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

6.5.3 Time Verification

SACC Manual clause C0711C (2008-05-12) - Time Verification

6.5.4 Limitation of Price

SACC Manual clause C6000C (2011-05-16) - Limitation of Price

6.6 INVOICING INSTRUCTIONS

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

1. Each claim must be supported by:
 - a. invoices which must include a breakdown of the total cost (category of services and names of resources; number of hours per category and hourly rates; direct expenses);
 - b. the portion of work completed by sub-contractor(s);
 - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses.
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment;
 - b. One (1) copy of the first invoice must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.7 INSURANCE

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

6.8 AUTHORITIES

6.8.1 Contracting Authority

The Contracting Authority for the Call-up will be identified in the resulting Call-up against the Standing Offer.

The Contracting Authority is responsible for the management of the Call-up, and any changes to the Call-up must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Call-up based on verbal or written requests or instructions from anybody other than the Contracting Authority.

6.8.2 Project Authority

The Project Authority for the Standing Offer will be identified in the Call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Call-up and is responsible for all matters concerning the technical content of the Work under the Call-up. Technical matters may be discussed with the Project Authority, however the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a call-up amendment issued by the Contracting Authority.

6.8.3 Offeror's Representative

The Offeror's Representative for the Standing Offer will be identified in each Call-up against the Standing Offer.

6.9 POLITICAL NEUTRALITY CERTIFICATION

The Contractor must complete and submit the Political Neutrality Certification in Annex "F" with the final report submitted to the Project Authority.

**ANNEX "A"
STATEMENT OF WORK**

- Annex "A1" – Series A (Fieldwork and Data Tabulation for Online Surveys)**
- Annex "A2" – Series B (Fieldwork and Data Tabulation for Telephone Surveys)**
- Annex "A3" – Series C (Qualitative Research)**
- Annex "A4" – Series D (Quantitative Research)**
- Annex "A5" – Series E (Qualitative and Quantitative Research)**

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ANNEX "A1"

**SERIES A
FIELDWORK AND DATA TABULATION FOR ONLINE SURVEYS**

A1.1 SERVICES REQUIRED

This section describes the work that may be performed under any resulting Standing Offer for Series A – Fieldwork and Data Tabulation for Online Surveys.

The Offeror will be expected to undertake online fieldwork and data tabulation, as and when requested. The Offeror is expected to conduct the following: programming, pretesting, data collection, and data tabulation using questionnaires and pre-test probes that have been provided by the client and provide pre-test and end results.

Therefore, the successful firms may be required to undertake **some or all** of the following activities:

- Attend meetings (in person or via conference call) with the Project Authority to discuss research purpose and objectives, design issues, research schedule, etc.;
- Provide client liaison in either official language;
- Advise on sample design, including size, weighting and definition of survey respondents and other aspects of the research methodology;
- Translate the final questionnaire into the other official language and revise as required;
- Program a questionnaire using a computer assisted web interviewing (CAWI) system (or otherwise reproducing the questionnaire for interviews);
- If a panel is being used, fully describe the panel composition;
- Register the survey with the National Survey Registration System;
- Prepare and distribute e-mail invitations to potential online respondents;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Prepare sample;

-
- List cleaning;
 - Host the online survey;
 - Provide secure and confidential links to the online survey for respondents;
 - Live review of survey prior to launch, including revision(s);
 - Provision of user ID's / Passwords;
 - Provide respondent support;
 - Ensure effective quality control measures;
 - Pre-test the questionnaire in both English and French;
 - Provide a briefing on the pre-test results;
 - Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions;
 - Ensure effective bilingual quality control measures;
 - Coding of data;
 - Enter results to create tables and coding procedures defined in consultation with the Project Authority;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
 - Provide the Project Authority with weighted partial results during fieldwork and complete weighted frequencies immediately following completion of fieldwork;
 - Provide a briefing on the final results;
 - Provide a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Provide a written methodological report as per the Public Opinion Research Final Report Checklist (Annex "E");
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders; and
 - Other activities or services as per specific project requirements.

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A1.2 STANDARDS FOR THE CONDUCT OF PUBLIC OPINION RESEARCH

The Government of Canada has developed standards for the conduct of quantitative online public opinion research surveys. Offerors must be prepared to meet or exceed these standards in all resulting contracted projects should they be issued a Standing Offer.

Standards for the Conduct of Government of Canada Public Opinion Research - Online Surveys

<http://www.tpsgc-pwgsc.gc.ca/rop-por/enligne-online-eng.html>

Where those standards do not cover particular issues, Offerors will be required to meet or exceed the standards of the Marketing Research and Intelligence Association (MRIA). More information on the MRJA's research standards can be found at:

<http://mria-arim.ca/sites/default/uploads/files/MRIAConduct-Dec2007REV2010.pdf>

In all cases, Government of Canada public opinion research standards take precedence over any other standards.

ANNEX "A2"**SERIES B
FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS****A2.1 SERVICES REQUIRED**

This section describes the work that may be performed under any resulting Standing Offer for Series B – Fieldwork and Data Tabulation for Telephone Surveys.

The Offeror will be expected to undertake telephone fieldwork and data tabulation, as and when requested. The Offeror is expected to conduct the following: programming, pretesting, interviewing, and data tabulation using questionnaires and pre-test probes that have been provided by the client and provide pre-test and end results.

Therefore, the successful firms may be required to undertake **some or all** of the following activities:

- Attend meetings (in person or via conference call) with the Project Authority to discuss research purpose and objectives, design issues, research schedule, etc.;
- Provide client liaison in either official language;
- Advise on sample design, including size, weighting and definition of survey respondents and other aspects of the research methodology;
- Translate the final questionnaire into the other official language and revise as required;
- Program a questionnaire using a computer assisted telephone interviewing (CATI) system (or otherwise reproducing the questionnaire for interviews);
- If a panel is being used, describe the panel composition;
- Placing telephone calls and telephone interviewing (includes long distance charges)
- List cleaning;
- Provide respondent support;
- Ensure effective quality control measures;
- Pre-test the questionnaire in both English and French;
- Provide a briefing on the pre-test results;
- Register the survey with the National Survey Registration System;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, a transfer or call-back must be made within 20 minutes of the initial call. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Ensure effective bilingual quality control measures;

- Coding of data;
- Enter results to create tables and coding procedures defined in consultation with the Project Authority;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Provide the Project Authority with weighted partial results during fieldwork and complete weighted frequencies immediately following completion of fieldwork;
- Provide a briefing on the final results;
- Provide a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a written methodological report as per the Public Opinion Research Final Report Checklist (Annex "E");
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders; and
- Other activities or services as per specific project requirements.

A2.2 STANDARDS FOR THE CONDUCT OF PUBLIC OPINION RESEARCH

The Government of Canada has developed standards for the conduct of quantitative telephone public opinion research surveys. Offerors must be prepared to meet or exceed these standards in all resulting contracted projects should they be issued a Standing Offer.

Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys

<http://www.tpsqc-pwgsc.gc.ca/rop-por/telephone-eng.html>

Where those standards do not cover particular issues, Offerors will be required to meet or exceed the standards of the Marketing Research and Intelligence Association (MRIA). More information on the MRIA's research standards can be found at:

<http://mria-arim.ca/sites/default/uploads/files/MRIAConduct-Dec2007REV2010.pdf>

In all cases, Government of Canada public opinion research standards take precedence over any other standards.

ANNEX "A3"**SERIES C
QUALITATIVE RESEARCH****A3.1 SERVICES REQUIRED**

This section describes the work that may be performed under any resulting Standing Offer for Series C – Qualitative Research.

The Offeror will be expected to undertake qualitative research with multiple target audiences, as and when requested, using a variety of qualitative methodologies. These methodologies may be dyads, triads, or one-on-one interviews, focus groups/group sessions, surfing sessions in specialized facilities and other online techniques, such as virtual focus groups, bulletin board groups, one-on-one interviews and any other qualitative techniques that the Offeror may propose in order to meet the research objectives of specific projects.

The Offeror may be required to provide partial or complete related research services from the design of the study to analyzing, presenting and reporting the results from such projects.

Therefore, the successful firms may be required to undertake **some or all** of the following activities:

- Attend meetings (in person or via conference call) with the Project Authority to discuss research purpose and objectives, design issues including participant selection, recruitment, administrative requirements, locations, research schedule and draft report, etc.;
- Provide client liaison in either official language;
- Design recruitment screeners and moderator's/interviewer's guides in the language(s) of participants and submit them to the Project Authority for approval;
- Recruit participants and/or interviewees which may include screening by such variables as age, gender, official language, ethnicity, education, income, etc.;
- If a panel is being used for recruitment purposes, describe the panel composition;
- Make arrangements for fieldwork, including provision of facilities, refreshments and the payment of honoraria to each participant, and wherever possible arrange for the fieldwork to take place in specialized facilities so that groups/interviews can be observed;
- When travel is required, provide a detailed estimate for approval by the project authority outlining the names of the individuals travelling, estimated costs for travel (i.e. flight and/or ground transportation) accommodations, meals and incidentals;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Inform participants of audio / videotaping / Webcasting of interviews / groups, intended use of tapes, or presence of observers;
- Obtain verbal consent for audio taping;
- Obtain participants' written consent for videotaping;
- Arrange for audio/video link, if available, for off-site observers;

-
- Arrange for audio and/or video recordings of groups and tape transcripts;
 - Provide simultaneous translation;
 - Conduct the groups or interviews;
 - Perform other functions essential to the administration of the research;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada, including fieldwork/recruiting;
 - Provide progress reports;
 - Submit a report outline to the Project Authority for approval;
 - Coding of qualitative data, if requested;
 - Analyze the results of the fieldwork;
 - Provide a verbal debriefing or written Flash Report;
 - Provide a written report in the official language chosen by the Project Authority, providing a draft copy and a final copy (electronic and hard copy) following receipt of the Project Authority's comments on the draft copy. The written report must include relevant content as per the Public Opinion Research Final Report Checklist (Annex "E");
 - Translate the final report into the other official language;
 - Make an oral presentation of the results;
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders; and
 - Other activities or services as per specific project requirements.

A3.2 STANDARDS FOR THE CONDUCT OF PUBLIC OPINION RESEARCH

In the absence of Government of Canada standards for qualitative research, the research must meet or exceed the qualitative standards of the MRIA (<http://mria-arim.ca/>).

It is anticipated that additional Government of Canada quality standards for qualitative research will be developed over the course of the period of resulting Standing Offers, and Offerors will be asked at that time to accept these additional terms of the Standing Offer. Once in place, the Government of Canada Qualitative Standards will take precedence over any other standards.

ANNEX "A4"**SERIES D
QUANTITATIVE RESEARCH****A4.1 SERVICES REQUIRED**

This section describes the work that may be performed under any resulting Standing Offer for Series D – Quantitative Research.

The Offeror will be expected to undertake quantitative research with multiple target audiences, as and when requested, surveys conducted primarily by telephone or online, but also through a variety of survey administration methods, such as mail and in-person surveys.

The Offeror may be required to provide complete related research services from the design of surveys to analyzing, presenting and reporting the results from such surveys.

Note: Telephone surveys requiring only fieldwork and data tabulation services will be conducted under the Series B Standing Offer and online surveys requiring only fieldwork and data tabulation will be conducted under the Series A Standing Offer.

Therefore, the successful firms, under Series D, may be required to undertake **some or all** of the following services:

- Attend meetings (in person or via conference call) with the Project Authority to discuss research purpose and objectives, design issues, research schedule and draft report, etc.;
- Provide client liaison in either official language;
- Advise on sample design, including size, weighting and definition of survey respondents and other aspects of the research methodology;
- Design questionnaires, translate them into the other official language and revise them as required;
- Provide an analysis plan that relates the survey questions and analytical methods to the research objectives;
- If a panel is being used, fully describe the panel composition;
- Program a questionnaire using a computer assisted telephone interviewing (CATI) system; (or otherwise reproducing the questionnaire for interviews);
- Program a questionnaire using a computer assisted web interviewing (CAWI) system; (or otherwise reproducing the questionnaire for an online survey);
- Pre-test the questionnaire in both English and French;
- Provide a briefing on the pre-test results;
- Register the survey with the National Survey Registration System;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Prepare and distribute e-mail invitations to potential online respondents;
- Prepare sample;
- List cleaning;

-
- Host the online survey;
 - Provide secure and confidential links to the online survey for respondents;
 - Live review of survey prior to launch, including revision(s);
 - Provision of user ID's / Passwords;
 - Provide respondent support;
 - Ensure effective quality control measures;
 - Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, a transfer or call-back must be made within 20 minutes of the initial call. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
 - Ensure effective bilingual quality control measures;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
 - Enter results and analyze the resulting interview data to create tables and coding procedures defined in consultation with the Project Authority;
 - Conduct additional analyses of the data, including multivariate analysis and report on this analysis;
 - When travel is required, provide a detailed estimate for approval by the project authority outlining the names of the individuals travelling, estimated costs for travel (i.e. flight and/or ground transportation) accommodations, meals and incidentals;
 - Provide the Project Authority with weighted partial results during fieldwork and complete weighted frequencies immediately following completion of fieldwork;
 - Provide a briefing on the final results;
 - Provide progress reports;
 - Submit a report outline to the Project Authority for approval;
 - Coding of data;
 - Analyze the results of the fieldwork;
 - Provide a verbal debriefing or written Flash Report;
 - Provide a draft written report in the official language chosen by the Project Authority, interpreting the results based on the approved analysis plan;
 - Provide a final copy (electronic and hard copy) following receipt of the Project Authority's comments on the draft copy; The written report must include relevant content as per the Public Opinion Research Final Report Checklist (Annex "E");
 - Provide a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Translate the final report into the other official language;
 - Make an oral presentation of the results;
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders; and
 - Other activities or services as per specific project requirements.

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A4.2 STANDARDS FOR THE CONDUCT OF PUBLIC OPINION RESEARCH

The Government of Canada has developed standards for the conduct of quantitative public opinion research (most applicable to telephone and online surveying), and Offerors must be prepared to meet or exceed these standards in all resulting contracted projects should they be issued a Standing Offer.

Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys

<http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>

Standards for the Conduct of Government of Canada Public Opinion Research - Online Surveys

<http://www.tpsgc-pwgsc.gc.ca/rop-por/enligne-online-eng.html>

Where those standards do not cover particular issues, Offerors will be required to meet or exceed the standards of the Marketing Research and Intelligence Association (MRIA). More information on the MRJA's research standards can be found at:

<http://mria-arim.ca/sites/default/uploads/files/MRIAConduct-Dec2007REV2010.pdf>

In all cases, Government of Canada public opinion research standards take precedence over any other standards.

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ANNEX "A5"

SERIES E QUALITATIVE AND QUANTITATIVE RESEARCH

A5.1 SERVICES REQUIRED

This section describes the work that may be performed under any resulting Standing Offer for Series E.

The Offeror will be expected to undertake a combination of Qualitative and Quantitative Research on an as and when requested basis.

A call up may include any or all of the activities specified under Annex "A3" and Annex "A4". Please refer to these documents for full details.

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ANNEX "B" BASIS OF PAYMENT

Basis of Payment "B1" – General Information

Basis of Payment "B2" – Series A (Fieldwork and Data Tabulation for Online Surveys)

Basis of Payment "B3" – Series B (Fieldwork and Data Tabulation for Telephone Surveys)

Basis of Payment "B4" – Series C (Qualitative Research)

Basis of Payment "B5" – Series D (Quantitative Research)

Basis of Payment "B6" – Series E (Qualitative and Quantitative Research)

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ANNEX "B1" GENERAL INFORMATION

B1.1 NOTE TO OFFERORS

The names of resources which will be identified in any resulting call-up against the Standing Offer must meet the minimum requirements for the category of service for which they are being proposed.

The Offeror will be paid in accordance with the following Basis of Payment for Work performed pursuant to any resulting Call-up against the Standing Offer.

The hourly and fixed unit rates are firm and will be used in the evaluation.

B1.2 HOURLY RATES

The firm hourly rates are all inclusive. They include the cost of labor, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only applicable taxes, if any. All expenses normally incurred in providing the services (e.g. office space, hardware and software, work estimates, telephone charges, local travel, etc.) are included in the firm hourly rates and will not be permitted as direct charges under any Call-up against a Standing Offer. **The Offeror is not permitted to charge hourly rates to prepare work estimates.**

The rates are in Canadian currency, Customs and duties are included, and applicable taxes are extra.

B1.3 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditures outside of the rates of the basis of payment reasonably and properly incurred to acquire goods and services from outside suppliers at the supplier's price, net of any trade or prompt payment discounts.

Note: Fixed unit costs for Fieldwork and Data Tabulation services contained in the Basis of Payment (all series) will be used in all circumstances including if work is sub-contracted.

B1.4 DIRECT EXPENSES – EXTERNAL AND INTERNAL

In certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses and outside of the rates of the basis of payment are required to complete the Work, such expenses may be allowable as direct expenses given the service(s) is/are documented in the approved Call-up. All such direct expenses must have prior authorization of the Project Authority and will be invoiced at cost with no allowance for overhead or profit.

B1.5 TRAVEL AND LIVING EXPENSES

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices "B", "C" and "D" of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All payments are subject to audit by Canada.

All travel must have prior authorization of the Project Authority.

B1.7 PRICE SUPPORT

The Offeror may be required to provide documents in support of the quoted rates such as a copy of the applicable current published price list; or a copy of a paid invoice for like items or services and percentage discount for the Government of Canada.

B1.8 CONTRACTUAL JOINT VENTURE (if applicable)

The Offeror is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition, it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.

ANNEX "B2"**SERIES A
FIELDWORK AND DATA TABULATION FOR ONLINE SURVEYS**

The Offeror must provide firm rates in Canadian currency, taxes extra, for the initial period of the Standing Offer and for each of the option periods thereafter.

B2.1 FIELDWORK AND DATA TABULATION FOR ONLINE SURVEYS**B2.1.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER**

(Insert the name of the proposed individual(s) and their hourly rate(s))

Survey Field Manager	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

B2.1.2 ONLINE PANEL COMPLETIONS, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Field window of four weeks;
- All inclusive costs related to the use of a panel;
- Registering the survey with the National Survey Registration System;
- Screen panel participants by predetermined variable such as; age, gender, official languages, ethnicity, education, income, etc;
- Programming a questionnaire;
- Administering the sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Live review of the survey prior to launch, including revision(s);
- Sending electronic invitations and up to two reminders to respondents;
- Hosting the survey;

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- Provide secure and confidential links to the online survey for respondents;
- Provision of user IDs/Passwords;
- Respondent support;
- Quality control;
- Data file creation and management;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada;
- Server throughput charges, using Canadian servers;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions.
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Rates are for individual questionnaire completion based on the range of survey completion indicated in the table below and do not include any specialized programming that is required for advanced online survey functionality. These will be costed as an external/internal direct expense.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500 – 3000 will be used minus any reduction, if applicable.

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TABLE B2.1.2 Fixed unit price for individual online panel completions, inclusive of data tabulation and methodological report.

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B2.1.3 OTHER ONLINE COMPLETIONS INCLUSIVE OF DATA TABULATIONS AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Field window of four weeks;
- Registering the survey with the National Survey Registration System;
- Screen panel participants by predetermined variable such as; age, gender, official languages, ethnicity, education, income, etc;
- Programming a questionnaire;
- Administering the sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will

be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;

- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Live review of the survey prior to launch, including revision(s);
- Sending electronic invitations and up to two reminders to respondents;
- Hosting the survey;
- Provide secure and confidential links to the online survey for respondents;
- Provision of user IDs/Passwords;
- Respondent support;
- Quality control;
- Data file creation and management;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada;
- Server throughput charges, using Canadian servers;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions.
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Rates are for individual questionnaire completion based on the range of survey completion indicated in the table below and do not include any costs for acquiring the sample or any specialized programming that is required for advanced online survey functionality. These will be costed as an external/internal direct expense.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500 - 3000 will be used minus any reduction, if applicable.

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TABLE B2.1.3 Fixed unit price for other individual online completions, inclusive of data tabulation and methodological report

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

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Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B2.2.1 TRANSLATION

The Offeror must provide firm hourly rates for the following category of personnel typically involved in the translation of information required for the research.

Category of Personnel (Individual names not required)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
Translator				

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B2.3.1 OTHER PROFESSIONAL RATES

This section should be completed by the Offeror who would like to identify other categories of personnel to be used during the Standing Offer and the option periods. If, for example, the Offeror intends to use the services of a Junior Researcher, it **must** indicate this category in the table below. Names of individuals fulfilling these roles are not required with the Offer.

At the time of a call-up, the Offeror will be required to submit the name of the individual(s) proposed for these roles supported by two projects demonstrating their experience in the role for which they are proposed. The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Offeror **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of personnel (Identify)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

ANNEX "B3"**SERIES B
FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS**

The Offeror must provide firm rates in Canadian currency, taxes extra, for the initial period of the Standing Offer and for each of the option periods thereafter.

B3.1 FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS**B3.1.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER**

(Insert the name of the proposed individual(s) and their hourly rate(s))

Survey Field Manager	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

B3.1.2 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a probability based sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply

unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;

- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 8 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are all 18 years of age or older.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500-3000 will be used minus any reduction, if applicable.

Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

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TABLE B3.1.2 Fixed unit price for landline telephone individual interview completions with the adult general public, inclusive of data tabulation and methodological report.

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

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Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B3.1.3 INCIDENCE RATE: ADDITIONAL COST BASED ON AN INCIDENCE RATE OF 90% OR LESS

Additional cost to Table **B3.1.2** per interview when the incidence rate for the selection and recruitment of participants that are found in the population (of adult Canadians 18 years of age or older) is 90% or less in Canadian households. This does not refer to the incidence rate for landline or cell phone-only households.

TABLE B3.1.3 Additional cost for incidence rates

Initial Period of Standing Offer			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

First Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

Second Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

Third Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

B3.2.1 CELL-PHONE ONLY TELEPHONE INTERVIEWS WITH YOUTH (18-34), INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a cell-phone only sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 5 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;

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- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are between the ages of 18 to 34 inclusive.

For individual questionnaire completions above 500, the individual questionnaire completion rate for the column 401-500 will be used minus any reduction, if applicable.

Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

TABLE B3.2.1 Fixed unit price for telephone individual interview completions with cell-phone only households of youth between the ages of 18-34, inclusive of data tabulation and methodological report

Initial Period of Standing Offer					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

First Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Second Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Third Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

B3.2.2 CELL-PHONE ONLY TELEPHONE INTERVIEWS WITH GENERAL POPULATION, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a cell-phone only sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the

purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;

- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 5 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are all 18 years of age or older.

For individual questionnaire completions above 500, the individual completion rate for the column 401-500 will be used minus any reduction, if applicable.

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Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

TABLE B3.2.2 Fixed unit price for telephone individual interview completions with cell-phone only households (General Population), inclusive of data tabulation and methodological report

Initial Period of Standing Offer					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

First Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Second Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Third Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

B3.3.1 LANDLINE TELEPHONE INTERVIEWS WITH THE GENERAL PUBLIC USING THE ADVERTISING CAMPAIGN EVALUATION TOOL (ACET) QUESTIONNAIRE, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The firm all inclusive lot-price includes the services described below:

- Client liaison and project management;
- Register the survey with the National Survey Registration System;
- Program the ACET questionnaire (Annex "H") in a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a probability based sample, random digit dialing (RDD);

-
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole at the end of the survey; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
 - Ensuring fieldwork commences 1-3 days prior the end of the campaign;
 - Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
 - Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
 - Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
 - Make a minimum of 8 call backs;
 - Monitor call dispositions/reasons for non-response throughout the field period
 - Ensure effective quality control measures;
 - Provide an oral briefing on the fieldwork status;
 - Data entry of results;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The data must be located and only accessible in Canada. It must be physically independent from all other databases, directly or indirectly, that are located outside of Canada;
 - All aspects of data processing must be conducted and only accessible in Canada;
 - Provide the Project Authority with unweighted and weighted partial results during fieldwork;
 - Create frequencies and cross tabulation tables and coding procedures defined in consultation with the Project Authority;
 - Coding of data;
 - Clean and weight the data;
 - Provide unweighted and weighted frequencies immediately following completion of fieldwork;
 - Provide fully labeled and cleaned SPSS dataset (including full variable and value labels as well as weighting variables), including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Prepare a draft methodology report, including executive summary (no analysis) in English. The report will include the reporting elements as detailed in the reporting requirements (Annex "E");
 - Finalize the methodology report;
 - Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

B3.3.2 The Offeror must provide a firm all inclusive lot price to complete **1000 interviews** with an average survey duration of seven (7) minutes, with the general public, using the ACET questionnaire (Annex "H").

- Use random digit dialing to achieve 1000 completed telephone interviews with quotas from the following age groups: 18-34 - 28%; 35-54 - 39% and 55+ - 33%. In addition, the Offeror will be required to achieve the following soft-quotas based on following distribution range:

Region	Sample Range
Atlantic	70-90
Quebec	230-260
Ontario	280-380
Manitoba/Saskatchewan	70-90 (5 interviews in Nunavut)
Alberta	110-130 (5 interviews in NWT)
British Columbia	130-150 (5 interviews in Yukon)
TOTAL	1,000

Note: Deviation from this proposed distribution is permitted so long as the information is collected among all five regions and will permit weighting the data at a regional level.

TABLE B3.3.2.1 Fixed unit price for 1000 telephone interview completions using the ACET questionnaire, inclusive of data tabulation and methodological report

Key Task	Name of Resource	# of Hours	Hourly/fixed Unit Rate	Cost
Project Management				
Data Collection - 1000 completed interviews / 7 minutes	N/A	N/A		
Translation of Executive Summary and Methodology Report	N/A			
Fixed Unit Price				

TABLE B3.3.2.2 Fixed unit price for 1000 telephone interview completions using the ACET questionnaire, inclusive of data tabulation and methodological report

Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
Fixed Unit Price /Survey	Fixed Unit Price /Survey	Fixed Unit Price /Survey	Fixed Unit Price /Survey
\$	\$	\$	\$

B3.3.3 The Offeror must provide a firm all inclusive lot price to complete **2000 interviews** with an average survey duration of approximately seven (7) minutes, with the general public, using the ACET questionnaire (Annex "H").

- Use random digit dialing to achieve 2000 completed telephone interviews with quotas from the following age groups: 18-34 - 28%; 35-54 - 39% and 55+ - 33%. In addition, the Offeror will be required to achieve the following soft-quotas based on following distribution range:

Region	Sample Range
Atlantic	140-180
Quebec	460-520
Ontario	560-760
Manitoba/Saskatchewan	140-180 (10 interviews in Nunavut)
Alberta	220-260 (10 interviews in NWT)
British Columbia	260-300 (10 interviews in Yukon)
TOTAL	2000

Note: Deviation from this proposed distribution is permitted so long as the information is collected among all five regions and will permit weighting the data at a regional level.

TABLE B3.3.3.1 Fixed unit price for 2000 telephone interview completions using the ACET questionnaire, inclusive of data tabulation and methodological report

Key Task	Name of Resource	# of Hours	Hourly/fixed Unit Rate	Cost
Project Management				
Data Collection - 2000 completed interviews / 7 minutes	N/A	N/A		
Translation of Executive Summary and Methodology Report	N/A			
Fixed Unit Price				

TABLE B3.3.3.2 Fixed unit price for 2000 telephone interview completions using the ACET questionnaire, inclusive of data tabulation and methodological report

Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
Fixed Unit Price /Survey	Fixed Unit Price /Survey	Fixed Unit Price /Survey	Fixed Unit Price /Survey
\$	\$	\$	\$

B3.4.1 TRANSLATION

The Offeror must provide firm hourly rates for the following category of personnel typically involved in the translation of information required for the research.

Category of Personnel (Individual names not required)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
Translator				

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B3.5.1 OTHER PROFESSIONAL RATES

This section should be completed by the Offeror who would like to identify other categories of personnel to be used during the Standing Offer and the option periods. If, for example, the Offeror intends to use the services of a Junior Researcher, it **must** indicate this category in the table below. Names of individuals fulfilling these roles are not required with the Offer.

At the time of a call-up, the Offeror will be required to submit the name of the individual(s) proposed for these roles supported by two projects demonstrating their experience in the role for which they are proposed. The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Offeror **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of personnel (Identify)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

ANNEX "B4"**SERIES C
QUALITATIVE RESEARCH**

The Offeror must provide firm rates in Canadian currency, taxes extra, for the initial period of the Standing Offer and each of the option periods thereafter.

B4.1 QUALITATIVE RESEARCH**B4.1.1 CLIENT LIAISON**

(Insert the name of the proposed individuals and their hourly rates).

Client Liaison	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

B4.1.2 SENIOR RESEARCHER: PROJECT MANAGEMENT, DESIGN, MODERATING, INTERVIEWING, ANALYSIS, REPORTING

(Insert the name of the proposed individuals and their hourly rates).

Senior Researcher	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

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B4.1.3 RECRUITMENT AND PARTICIPANT CONFIRMATION, PROGRAMMER, AND TRANSLATOR

The Offeror must provide firm hourly rates for the following categories of personnel typically involved in the qualitative fieldwork.

Category of Personnel (Individual names not required)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
Field Supervisor				
Field Manager				
Interviewer/recruiter				
Programmer				
Translator				

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B4.1.4 OTHER PROFESSIONAL RATES

This section should be completed by the Offeror who would like to identify other categories of personnel to be used during the Standing Offer and the option periods. If, for example, the Offeror intends to use the services of a Junior Researcher, it **must** indicate this category in the table below. Names of individuals fulfilling these roles are not required with the Offer.

At the time of a call-up, the Offeror will be required to submit the name of the individual(s) proposed for these roles supported by two projects demonstrating their experience in the role for which they are proposed. The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Offeror **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of personnel (Identify)	Initial Period of Standing Offer Hourly rate (\$)	First Option Period of Standing Offer (1 year) Hourly rate (\$)	Second Option Period of Standing Offer (1 year) Hourly rate (\$)	Third Option Period of Standing Offer (1 year) Hourly rate (\$)
(Add lines as required)				

ANNEX "B5"**SERIES D
QUANTITATIVE RESEARCH**

The Offeror must provide firm rates in Canadian currency, taxes extra, for the initial period of the Standing Offer and each of the option periods thereafter.

B5.1 QUANTITATIVE RESEARCH (ALL MODES)**B5.1.1 CLIENT LIAISON**

(Insert the name of the proposed individuals and their hourly rates).

Client Liaison	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

B5.1.2 SENIOR RESEARCHER: PROJECT MANAGEMENT, DESIGN, ANALYSIS, REPORTING

(Insert the name of the proposed individuals and their hourly rates).

Senior Researcher	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

B5.2 QUANTITATIVE RESEARCH (TELEPHONE INTERVIEWS)

B5.2.1 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION

The rates include costs for the following activities:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering of a probability based sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 8 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including field work;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will involve open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset; and

- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

The rates assume that no screening criteria are applied except that the respondents are all 18 years of age or older.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500-3000 will be used minus any reduction, if applicable.

Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

TABLE B5.2.1 Fixed unit price for individual landline telephone completions with the adult general public, inclusive of data tabulation

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

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Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B5.2.2 INCIDENCE RATE: ADDITIONAL COST BASED ON AN INCIDENCE RATE OF 90% OR LESS

Additional cost to Table **B5.2.1** per interview when the incidence rate for the selection and recruitment of participants that are found in the population (of adult Canadians 18 years of age or older) is 90% or less in Canadian households. This does not refer to the incidence rate for landline or cell phone-only households.

TABLE B5.2.2 Additional cost for incidence rates

Initial Period of Standing Offer			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

First Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

Second Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

Third Option Period of Standing Offer (1 year)			
Incidence Rate	Additional cost per interview	Incidence Rate	Additional cost per interview
5%		50%	
10%		55%	
15%		60%	
20%		65%	
25%		70%	
30%		75%	
35%		80%	
40%		85%	
45%		90%	

B5.2.3 CELL-PHONE ONLY TELEPHONE INTERVIEWS WITH YOUTH (18-34), INCLUSIVE OF DATA TABULATION

The rates include costs for the following activities:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering of a cell-phone only sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 5 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;

- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including field work;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset; and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are between the ages of 18 to 34 inclusive.

For individual questionnaire completions above 500, the individual questionnaire completion rate for the column 401-500 will be used minus any reduction, if applicable.

Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

TABLE B5.2.3 Fixed unit price for individual telephone interview completions with cell-phone only households of youth between the ages of 18-34, inclusive of data tabulation

Initial Period of Standing Offer					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

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First Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Second Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Third Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

B5.2.4 CELL-PHONE ONLY TELEPHONE INTERVIEWS WITH GENERAL POPULATION, INCLUSIVE OF DATA TABULATION

The rates include costs for the following activities:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering of a cell-phone only sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 5 call backs;

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- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset; and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are 18 years of age or older.

For individual questionnaire completions above 500, the individual questionnaire completion rate for the column 401-500 will be used minus any reduction, if applicable.

Rates are per individual interview completion based on the range of telephone interviews indicated in the table.

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TABLE B5.2.4 Fixed unit price for individual telephone interview completions with cell-phone only households (General Population), inclusive of data tabulation

Initial Period of Standing Offer					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

First Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Second Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

Third Option Period of Standing Offer (1 year)					
Interview Duration	Number of completed Interviews				
	1-100	101-200	201-300	301-400	401-500
5 minutes					
6 minutes					
7 minutes					
8 minutes					
9 minutes					
10 minutes					
11 minutes					
12 minutes					
13 minutes					
14 minutes					
15 minutes					

B5.3 QUANTITATIVE RESEARCH (ONLINE INTERVIEWS)

B5.3.1 RATES FOR ONLINE PANEL COMPLETIONS, INCLUSIVE OF DATA TABULATION

The rates include costs for the following activities:

- Field window of four weeks;
- All inclusive costs related to the use of a panel;
- Registering the survey with the National Survey Registration System;
- Screen panel participants by predetermined variable such as; age, gender, official languages, ethnicity, education, income, etc;
- Programing a questionnaire;

-
- Administering the sample;
 - Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
 - Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
 - Live review of the survey prior to launch, including revision(s);
 - Sending electronic invitations and up to two reminders to respondents;
 - Hosting the survey;
 - Provide secure and confidential links to the online survey for respondents;
 - Provision of user IDs/Passwords;
 - Respondent support;
 - Quality control;
 - Data file creation and management;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada;
 - Server throughput charges, using Canadian servers;
 - Coding of open ended questions off-line;
 - Assume 10% of the interview duration will include open-ended questions;
 - Create frequencies and cross data tabulation tables;
 - Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset; and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Rates are for individual questionnaire completion based on the range of survey completion indicated in the table below and do not include any specialized programming that is required for advanced online survey functionality. These will be costed as an external/internal direct expense.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500 – 3000 will be used minus any reduction, if applicable.

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TABLE B5.3.1 Fixed unit price for individual online panel completions, inclusive of data tabulation

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B5.3.2 RATES FOR OTHER ONLINE COMPLETIONS, INCLUSIVE OF DATA TABULATION

The rates include costs for the following activities:

- Field window of four weeks;
- Registering the survey with the National Survey Registration System;
- Screen panel participants by predetermined variable such as; age, gender, official languages, ethnicity, education, income, etc;
- Programming a questionnaire;
- Administering the sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;

-
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;
 - Live review of the survey prior to launch, including revision(s);
 - Sending electronic invitations and up to two reminders to respondents;
 - Hosting the survey;
 - Provide secure and confidential links to the online survey for respondents;
 - Provision of user IDs/Passwords;
 - Respondent support;
 - Quality control;
 - Data file creation and management;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada;
 - Server throughput charges, using Canadian servers;
 - Coding of open ended questions off-line;
 - Assume 10% of the interview duration will include open-ended questions;
 - Create frequencies and cross data tabulation tables;
 - Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset; and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Rates are for individual questionnaire completion based on the range of survey completion indicated in the table below and do not include any costs for acquiring the sample or any specialized programming that is required for advanced online survey functionality. These will be costed as an external/internal direct expense.

For individual questionnaire completions above 3000, the individual questionnaire completion rate for 2500 - 3000 will be used minus any reduction, if applicable.

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TABLE B5.3.2 Fixed unit price for other individual online completions, inclusive of data tabulation

Initial Period of Standing Offer						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

First Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Solicitation No. - N° de l'invitation

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Second Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

Third Option Period of Standing Offer (1 year)						
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000
5 minutes						
6 minutes						
7 minutes						
8 minutes						
9 minutes						
10 minutes						
11 minutes						
12 minutes						
13 minutes						
14 minutes						
15 minutes						
20 minutes						

B5.4.1 PROFESSIONAL RATES

The Offeror must provide firm hourly rates for the following categories of personnel typically involved in online fieldwork identified under Series D – Quantitative Research.

Category of Personnel (Individual names not required)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
Programmer				
Translator				
Sample Manager				
Coder (open-ended)				

B5.4.2 OTHER PROFESSIONAL RATES

This section should be completed by the Offeror who would like to identify other categories of personnel to be used during the period of the Standing Offer. If, for example, the Offeror intends to use the services of a Junior Researcher, it **must** indicate this category in the table below. Other examples of categories could include: Junior Analysts, Multivariate Analyst, etc. Names of individuals fulfilling these roles are not required with the Offer.

At the time of a call-up, the Offeror will be required to submit the name of the individual(s) proposed for these roles supported by two projects demonstrating their experience in the role for which they are proposed. The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Offeror **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of personnel (Identify)	Initial Period of Standing Offer	First Option Period of Standing Offer (1 year)	Second Option Period of Standing Offer (1 year)	Third Option Period of Standing Offer (1 year)
	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)	Hourly rate (\$)
(Add lines as required)				

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ANNEX "B6"

SERIES E QUALITATIVE AND QUANTITATIVE RESEARCH

The Offeror must provide firm rates in Canadian currency, taxes extra, for the initial period of the Standing Offer and each of the option periods thereafter.

B6.1 QUALITATIVE AND QUANTITATIVE RESEARCH

The Basis of Payment of this section includes all elements from Annex "B4" and Annex "B5".

ANNEX "C"
TECHNICAL AND FINANCIAL EVALUATION

1. TECHNICAL EVALUATION – SERIES A (FIELDWORK AND DATA TABULATION FOR ONLINE SURVEYS)

SERIES A: FIELDWORK AND DATA TABULATION FOR ONLINE SURVEYS

1.1 MANDATORY TECHNICAL CRITERIA – SERIES A

MA.1 Corporate Profile

The Offeror must submit a corporate profile detailing:

- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities (e.g. in-house or subcontracted services);
- A description of the Offeror's panel, where applicable;
- Location of online field services/server (e.g. in-house or subcontracted services); and
- A copy of the firm's Privacy Policy.

MA.2 Offeror's Submission – Series

Offerors must complete Appendix "1" – Offer's Submission – Series in order to identify for which series they are providing the required services.

MA.3 Survey Field Manager

The Offeror must identify one (1) survey field manager able to communicate with the project authority in English and one (1) survey field manager able to communicate in French. This individual identified for each language can be the same person. The survey field manager will be responsible to act as:

- Client liaison
- Immediate supervision of all aspects of the fieldwork, including:
 - programming of study questionnaire in CAWI or equivalent software and data entry;
 - sample and quota management;
 - administration of pre-test;
 - on-going project support during data collection;
 - troubleshooting;

- development of a code list for open ended questions;
- data weighting;
- the project management of the panel;
- monitoring of response rates and subsequent reporting;
- provision of deliverables, including data files and detailed tables; and
- outline variables and cross-tabulation of the requirements for the detailed tables including production of tables

MA.4 Fieldwork Staff

All field staff must be located in Canada. The Offeror must identify whether all fieldwork will be conducted with either:

- in-house resources;
- a sub-contractor; or
- a combination of in-house resources and a sub-contractor.

If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the Standing Offer unless authorized in writing by PWGSC.

In the case of the use of a sub-contractor, the Offeror must provide:

- The name of the sub-contractor;
- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities;
- A description of the sub-contractor's panel, where applicable;
- Location of online field services/server (e.g. in-house or subcontracted services); and
- A copy of the firm's Privacy Policy.

MA.5 Bilingual Capabilities

The Offeror must describe two (2) bilingual projects supervised by the Offeror's proposed Survey Field Manager identified in MA.3. Each project must have a minimum of 250 interviews completed in English and 250 interviews completed in French. The fieldwork of each project must have been completed in the last seven (7) years of the bid closing date.

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MA.6 Basis of Payment

The Offeror must provide rates for the initial period and each of the option periods of the Standing Offer in accordance with Annex "B2" - Basis of Payment, Series A - Fieldwork and Data Tabulation for Online Surveys.

If pricing is not provided for a component, a price of zero will be assigned for the component and the Offeror will be provided an opportunity to agree with the zero amount.

If the Offeror agrees then the Basis of Payment will be considered compliant. However, if the Offeror disagrees, then the proposal will be found non-compliant and no further evaluation will be done.

**OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN
NO FURTHER CONSIDERATION**

1.2 POINT RATED TECHNICAL CRITERIA – SERIES A (Maximum 800 points)

THE POINT RATED TECHNICAL CRITERIA – SERIES A WILL BE EVALUATED IN THE FOLLOWING ORDER:

STEP 1: RA.1 AND THEN RA.2.

STEP 2: RA.3 AND THEN RA.4.

OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR ANY OF THE RATED CRITERIA IN STEP 1 WILL NOT PROCEED TO STEP 2.

STEP 1:**RA.1 Survey Field Manager Qualifications (Minimum 80 points – Maximum 100 points)**

The qualifications of each survey field manager proposed in MA.3 will be evaluated as follows:

- Academic qualifications / other qualifications / training / certifications / publications / awards and memberships relevant to public opinion research (POR) fieldwork management as described in MA.3. **(Maximum 30 points)**
- Work experience – For each Survey Field Manager proposed, the Offeror should identify:
 - a. the total number of years of public opinion research experience; and
 - b. the total experience of each survey field manager proposed should be broken down by year / organization / role and include a brief description of how the work relates to POR.
(Maximum 70 points)

The qualifications of each survey field manager of the proposed team will be evaluated on the basis of 100 points. An average score of all proposed survey field manager(s) will be calculated.

To facilitate the evaluation process the Offeror should use the qualifications template included as Appendix “4”, however, Offerors can also submit a Curriculum Vitae which cover all requested information.

RA.2 Survey Field Manager Project Experience (Minimum 400 points – Maximum 500 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) online POR projects completed in Canada by each survey field manager identified in MA.3. Each project will have been completed in Canada with a minimum of five hundred (500) survey completions and involving a minimum survey duration of five (5) minutes. The role of the survey field manager defined in MA.3 should be detailed. Details of any project experience in the curriculum vitae or qualifications template will not be evaluated for the purpose of this criterion. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Aboriginals, ethno cultural groups, seniors, youth, general population, etc), as long as the project was conducted in Canada with Canadians.

Project experience will be evaluated based on the criteria listed below.

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- Project fieldwork was completed in the last seven (7) years of the bid closing date. **(Maximum 50 points)**
- There were at least five hundred (500) survey completions and involving a minimum survey duration of at least five (5) minutes. **(Maximum 100 points)**
- The target audience of the project was with the Canadian adult general public or sub-groups of the Canadian adult population. **(Maximum 50 points)**
- At least one of the five projects used a panel **(Maximum 100 points)**
- At least one of the five projects used a list provided by the client **(Maximum 100 points)**
- The role of the Survey Field Manager is commensurate with the role described in MA.3. **(Maximum 100 points)**

The Offeror should use the following layout to describe each proposed project:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Methodology including:
 - the number and characteristics of respondents;
 - questionnaire duration;
 - data collection method used;
 - sample design (panel, list based, etc.);
- Fieldwork location by Canadian province/territory; and
- Roles (not organizational titles) performed by the proposed Survey Field Manager (provide details, client liaison, supervision of the programming, etc.).

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided.

An average score of all the proposed survey field managers will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points.

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**OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR RA.1 AND RA.2
OF THE POINT RATED TECHNICAL CRITERIA FOR SERIES A
WILL BE GIVEN NO FURTHER CONSIDERATION.**

STEP 2

RA.3 Sample Project (Minimum 152 points - Maximum 190 points)

The Offeror should submit a proposal based on the example statement of work and instructions provided for Series A - Fieldwork and Data Tabulation for Online Surveys.

Research projects conducted and contracted under these Standing Offers will vary in size, complexity and subject. Offerors are required to provide a proposal that demonstrates their preparedness to conduct the following fictitious project within a 6 week deadline. The proposed study will not be contracted and Offerors' proposals in relation to this study will be used exclusively for purposes of evaluation in the context of this Request for Standing Offer (RFSO).

Here are the details of the sample project:

Statement of Work

Client: Canadian Health Unit (fictitious organization)

Title: Quantitative Research on Vaccines

Time frame and Budget (applicable taxes included):

6 weeks \$45,000.00

Background:

The Canadian Health Unit wants to gather information on Canadians' views about childhood vaccinations. The information collected will be used to help direct and create program information in the future. In the past, the Canadian Health Unit has utilized a telephone survey to gather information. However, due to the cost associated with low incidence rates and the changing dynamics of Canadian families (i.e. busy families are reluctant to participate in telephone surveys, cell-phone only young families etc.) they are looking to employ an online survey to address these issues.

Requirement:

The Offeror is required to demonstrate how they would complete a total of 1500 online surveys with the average survey duration of about seven (7) minutes. The sample will consist of:

1. Individuals who recently contacted the Health Unit in the past 12 months seeking information on vaccines (list consists of 3000 email addresses, permission provided by clients for contact). List is proportional to the six regions listed below.
2. Pregnant women
3. Families with children aged newborn to 12
4. General Population Canadians aged 18+

No questionnaire design or data analysis is required.

The Offeror is required to describe a quantitative field and tabulation online methodology based on a 6 week timeframe. The online approach may contain a panel to supplement the list provided.

The research includes the following requirements:

- Client liaison and project management;
- Register the survey with the National Survey Registration System;
- Program the questionnaire in a computer-assisted web interviewing (CAWI) system, or otherwise reproducing the questionnaire for interviewers;
- Pre-test each survey questionnaire in English (10) and in French (10) and provide a brief written analysis (in one language) of pre-test results;
- Purchase and administer a sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Achieve 1500 completed online interviews regionally proportional to the Canadian provinces/territories. Offerors should suggest a sample plan that will address the four (4) sample groups for this project and how to reach those groups. The Offeror is expected to propose soft quotas based on the following:

Region	Suggested Sample
Atlantic	
Quebec	
Ontario	
Manitoba/Saskatchewan	
Alberta	
British Columbia	
TOTAL	1500
Sample Groups	Suggested Sample
Canadian Health Unit Clients	
Pregnant women	
Families with children aged newborn to 12	
General population Canadians 18+	
TOTAL	1500

- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions
- Sending electronic invitations and up to two reminders to respondents;

-
- Hosting the survey, on a server located in Canada;
 - Provide secure and confidential links to the online survey for respondents;
 - Live review of survey prior to launch, including revision(s);
 - Provision of user IDs/Passwords;
 - Bilingual respondent support;
 - Quality control;
 - Ensure effective quality control measures;
 - Monitor call dispositions/reasons for non-response throughout the field period;
 - Provide an oral briefing on the fieldwork status;
 - Data entry of results;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The data must be located and only accessible in Canada. It must be physically independent from all other databases, directly or indirectly, that are located outside of Canada;
 - All aspects of data processing must be conducted and only accessible in Canada;
 - Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole at the end of the survey; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
 - Provide the Project Authority partial results during fieldwork;
 - Create frequencies and cross tabulation tables and coding procedures defined in consultation with the Project Authority;
 - Code the data;
 - Clean the data;
 - Provide frequencies immediately following completion of fieldwork;
 - Provide fully labelled and cleaned SPSS dataset (including full variable and value labels as well as weighting variables), including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Prepare a draft methodology report, including executive summary (no analysis) in English. The report will include the reporting elements as detailed in the reporting requirements (Annex "E");
 - Finalize the methodology report;
 - Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.
- When Offerors are preparing their responses they should keep in mind:
 - *Library and Archives of Canada Act* <http://laws-lois.justice.gc.ca/eng/acts/L-7.7/>
 - Public Opinion Research Contract Regulations. <http://laws-lois.justice.gc.ca/eng/regulations/SOR-2007-134/page-1.html>
 - Communications Policy of the Government of Canada <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12316>

- Procedures for the Management of Public Opinion Research <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28033>
- The Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys (Annex “G”)
- Marketing Research and Intelligence Association (MRIA) Code of Conduct and Good Practice <http://mria-arim.ca/sites/default/uploads/files/MRIACoConduct-Dec2007REV2010.pdf>
- Public Opinion Research Final Report: Requirements and General Advice (Annex “E”)

Offeror’s response to the sample project:

The Offeror will provide details and will be evaluated on the following items:

1. Understanding of the project requirement; **(5 points)**
2. A description of the methodology including the following details:
 - a. Detailed sample plan with quota’s regionally proportional to the Canadian provinces/territories and the four target groups of the research, including information on the source of targets (e.g., census data or other data source); **(15 points)**
 - b. A discussion on list based sample and panels; **(10 points)**
 - c. A detailed explanation of the screening criteria for each target audience; **(10 points)**
 - d. A discussion of techniques to increase response/participation rates; and **(10 points)**
 - e. A discussion about weighting, including possible advantages and disadvantages; **(10 points)**
3. A detailed description of the panel including:
 - a. Panel size; **(5 points)**
 - b. Panel recruitment; **(5 points)**
 - c. Panel monitoring; **(5 points)**
 - d. Panel maintenance; **(5 points)**
 - e. Panel refreshment; and **(5 points)**
 - f. Any incentives/honoraria. **(5 points)**
4. All quality control measures taken by the Offeror to ensure the accuracy of their data collection and verification procedures including:
 - a. Data input as well as data validity and integrity checks; and **(10 points)**
 - b. Editing and coding procedures including methods used to assure inter-coder reliability. **(10 points)**
5. Information and variables to be contained in the data tables; **(10 points)**
6. Potential challenges or problems the Offeror may face in conducting the work and how the Offeror would address them. This includes:
 - a. A description of measures planned by the Offeror to meet the Offerors suggested quota’s; **(20 points)**
 - b. Steps proposed to minimize non-response; **(20 points)**
 - c. A description of potentials areas of non-response bias and how they will be identified and evaluated; and **(25 points)**
7. A detailed timetable for the quantitative research consistent with the 6 week timeframe. **(5 points)**

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RA.4 Environmental Attributes (Minimum N/A – Maximum 10 points)

The Offeror should provide their existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); and their existing or proposed action plan for materials/equipment sourcing (e.g., intended use of recycled or reused products, waste management strategy, etc.).

1.3 FINANCIAL EVALUATION – SERIES A**A. HOURLY RATES FOR SERVICES****WEIGHTING**

- | | |
|-------------------------|----|
| 1. Survey Field Manager | 5% |
| 2. Translator | 1% |

B. RATES FOR INTERVIEWS (FIRM ALL INCLUSIVE LOT PRICE)

- | | |
|---|-----|
| 3. Rates for Online Panel Completions and Data Tabulation | 47% |
| 4. Rates for Other Online Completions and Data Tabulation | 47% |

TOTAL	100%
-------	------

The following table is an example of how the total evaluated price, and the weighted pricing score will be calculated from the rates provided in the basis of payment.

Rates used in this example are for demonstration purposes only, and are not intended to reflect any expectations on behalf of the Government of Canada.

Step 1

Calculate the average value of all cells for the applicable tables of the basis of payment. Below is one table, for the purpose of this example.

TABLE B2.1.2 Fixed unit price for individual online panel completions, inclusive of data tabulation and methodological report

Initial Period of Standing Offer							
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000	Average value for each row
5 minutes	20	30	30	30	30	40	\$30.00
6 minutes	25	27.5	30	30	32.5	35	\$30.00
7 minutes	35	35	35	35	35	35	\$35.00
8 minutes	35	35	35	35	35	35	\$35.00
9 minutes	35	35	35	40	40	40	\$37.50
10 minutes	38	39	40	40	41	42	\$40.00
11 minutes	37	38	39	41	42	43	\$40.00
12 minutes	40	40	40	45	45	45	\$42.50
13 minutes	35	40	42.5	47.5	50	55	\$45.00
14 minutes	45	45	45	45	45	45	\$45.00
15 minutes	45	47	49	51	53	55	\$50.00
20 minutes	50	50	50	50	50	50	\$50.00
Average value of all cells							\$40.00

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Step 2**A. HOURLY RATE CATEGORIES FOR THE INITIAL PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$70.00	5%	\$3.50
Translator	\$50.00	1%	\$0.50
TOTAL (A)			\$4.00

B. RATES FOR ONLINE INTERVIEW COMPLETIONS FOR THE INITIAL PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Factor
Rates for Online Panel Completions and Data Tabulation	\$40.00	47%	\$18.80
Rates for Other Online Completions and Data Tabulation	\$40.00	47%	\$18.80
TOTAL (B)			\$37.60
TOTAL (A+B)			\$41.60

Step 3**A. HOURLY RATE CATEGORIES FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$70.00	5%	\$3.50
Translator	\$50.00	1%	\$0.50
TOTAL (A)			\$4.00

B. RATES FOR ONLINE INTERVIEW COMPLETIONS FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Factor
Rates for Online Panel Completions and Data Tabulation	\$40.00	47%	\$18.80
Rates for Other Online Completions and Data Tabulation	\$40.00	47%	\$18.80
TOTAL (B)			\$37.60
TOTAL (A+B)			\$41.60

Step 4**A. HOURLY RATE CATEGORIES FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$75.00	5%	\$3.75
Translator	\$55.00	1%	\$0.55
TOTAL (A)			\$4.30

B. RATES FOR ONLINE INTERVIEW COMPLETIONS FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Factor
Rates for Online Panel Completions and Data Tabulation	\$45.00	47%	\$21.15
Rates for Other Online Completions and Data Tabulation	\$45.00	47%	\$21.15
TOTAL (B)			\$42.30
TOTAL (A+B)			\$46.60

Step 5**A. HOURLY RATE CATEGORIES FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$80.00	5%	\$4.00
Translator	\$60.00	1%	\$0.60
TOTAL (A)			\$4.60

B. RATES FOR ONLINE INTERVIEW COMPLETIONS FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Factor
Rates for Online Panel Completions and Data Tabulation	\$50.00	47%	\$23.50
Rates for Other Online Completions and Data Tabulation	\$50.00	47%	\$23.50
TOTAL (B)			\$47.00
TOTAL (A+B)			\$51.60

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Step 6

PERIODS	TOTAL (A+B)
Initial Period of the Standing Offer (\$41.60 x 3)	\$124.80*
First Option Period of the Standing Offer	\$41.60
Second Option Period of the Standing Offer	\$46.60
Third Option Period of the Standing Offer	\$51.60
TOTAL OFFER COST	\$264.60

*= Please note that the Total (A+B) for the Initial period of the Standing Offer will be multiplied by 3 for the purpose of the financial evaluation.

Step 7- To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.

$$\frac{\text{Lowest Responsive Evaluated Price}}{\text{Offeror's Evaluated Price}}$$

X 20 % = Weighted Pricing Score

OFFERORS	TOTAL EVALUATED PRICE	WEIGHTED PRICING SCORE
OFFEROR A	\$264.60	17.38
OFFEROR B	\$260.00	17.69
OFFEROR C	\$255.00	18.04
OFFEROR D	\$280.00	16.43
OFFEROR E	\$277.00	16.61
OFFEROR F	\$310.00	14.84
OFFEROR G	\$330.00	13.94
OFFEROR H	\$315.00	14.60
OFFEROR I	\$300.00	15.33
OFFEROR J	\$230.00	20.00
OFFEROR K	\$350.00	13.14
OFFEROR L	\$425.00	10.82
OFFEROR M	\$375.00	12.27
OFFEROR N	\$400.00	11.50
OFFEROR O	\$345.00	13.33

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1.4 TECHNICAL MERIT SCORE

The example demonstrates how the technical merit score will be calculated.

To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows:

$$\frac{\text{Total number of points obtained}}{\text{Maximum number of points available}} \times 80\% = \text{Weighted Technical Score}$$

Scores used in this example are for demonstration purposes only.

OFFERORS	TOTAL NUMBER OF POINTS OBTAINED (OUT OF 800 POINTS)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)
OFFEROR A	710	71
OFFEROR B	730	73
OFFEROR C	705	70.5
OFFEROR D	750	75
OFFEROR E	790	79
OFFEROR F	700	70
OFFEROR G	780	78
OFFEROR H	700	70
OFFEROR I	690	69
OFFEROR J	640	64
OFFEROR K	780	78
OFFEROR L	670	67
OFFEROR M	725	72.5
OFFEROR N	770	77
OFFEROR O	745	74.5

1.5 COMBINED RATING

The example demonstrates how the final combined rating will be calculated.

The technical merit score and the pricing score will be added to determine its combined rating.

Scores used in this example are for demonstration purposes only.

OFFERORS	WEIGHTED FINANCIAL SCORE (OUT OF 20 POINTS)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)	COMBINED RATING (OUT OF 100 POINTS)	RANKING OF COMBINED RATING
OFFEROR A	17.38	71	88.38	7
OFFEROR B	17.69	73	90.69	5
OFFEROR C	18.04	70.5	88.54	6
OFFEROR D	16.43	75	91.43	3
OFFEROR E	16.61	79	95.61	1
OFFEROR F	14.84	70	84.84	10
OFFEROR G	13.94	78	91.94	2
OFFEROR H	14.60	70	84.60	12
OFFEROR I	15.33	69	84.33	13
OFFEROR J	20.00	64	84.00	14
OFFEROR K	13.14	78	91.14	4
OFFEROR L	10.82	67	77.82	15
OFFEROR M	12.27	72.5	84.77	11
OFFEROR N	11.50	77	88.50	8
OFFEROR O	13.33	74.5	87.83	9

Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Series, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer for each Series.

In the example above, Offerors A, B, C, D, E, F, G, K, N, and O would be recommended for issuance of a Standing Offer. Offerors H, I, J, L, and M would not be recommended for issuance of a Standing Offer.

2. TECHNICAL EVALUATION – SERIES B (FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS)

SERIES B: FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS

2.1 MANDATORY TECHNICAL CRITERIA – SERIES B

MB.1 Corporate Profile

The Offeror must submit a corporate profile detailing:

- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities (e.g. in-house or subcontracted services);
- Number and locations of telephone stations (e.g. in-house or subcontracted services); and
- A copy of the firm's Privacy Policy.

MB.2 Offeror's Submission – Series

Offerors must complete Appendix "1" – Offer's Submission – Series in order to identify for which series they are providing the required services.

MB.3 Survey Field Manager

The Offeror must identify one (1) survey field manager able to communicate with the project authority in English and one (1) survey field manager able to communicate in French. This individual identified for each language can be the same person. The survey field manager will be responsible to act as:

- Client liaison
- Immediate supervision of all aspects of the fieldwork, including:
 - programming of study questionnaire in CATI or equivalent software and data entry;
 - sample and quota management;
 - administration of pre-test;
 - on-going project support during data collection;
 - troubleshooting;
 - development of a code list for open ended questions;

- data weighting;
 - monitoring of response rates and subsequent reporting;
 - provision of deliverables, including data files and detailed tables; and
- Outline variables and cross-tabulation of the requirements for the detailed tables including production of tables.

MB.4 Fieldwork Staff

All field staff must be located in Canada. The Offeror must identify whether all fieldwork will be conducted with either:

- in-house resources;
- a sub-contractor; or
- a combination of in-house resources and a sub-contractor.

If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the Standing Offer unless authorized in writing by PWGSC.

In the case of the use of a sub-contractor, the Offeror must provide:

- The name of the sub-contractor;
- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities;
- Number and locations of telephone stations; and
- A copy of the firm's Privacy Policy.

MB.5 Bilingual Capabilities - Fieldwork Staff

The Offeror must describe two (2) bilingual projects conducted with the Offerors proposed field staff, each with a minimum of 250 interviews completed in English and 250 interviews completed in French. The fieldwork of each project must have been completed in the last seven (7) years of the bid closing date

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MB.6 Basis of Payment

The Offeror must provide rates for the initial period and each of the option periods of the Standing Offer in accordance with Annex "B3" - Basis of Payment, Series B – Fieldwork and Data Tabulation for Telephone Surveys.

If pricing is not provided for a component, a price of zero will be assigned for the component and the Offeror will be provided an opportunity to agree with the zero amount.

If the Offeror agrees then the Basis of Payment will be considered compliant. However, if the Offeror disagrees, then the proposal will be found non-compliant and no further evaluation will be done.

**OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN
NO FURTHER CONSIDERATION**

2.2 POINT RATED TECHNICAL CRITERIA – SERIES B (Maximum 800 points)

THE POINT RATED TECHNICAL CRITERIA – SERIES B WILL BE EVALUATED IN THE FOLLOWING ORDER:

STEP 1: RB.1, RB.2, AND THEN RB.3.

STEP 2: RB.4 AND THEN RB.5

OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR ANY OF THE RATED CRITERIA IN STEP 1 WILL NOT PROCEED TO STEP 2.

STEP 1:

RB.1 Survey Field Manager Qualifications (Minimum 80 points – Maximum 100 points)

The qualifications of each survey field manager proposed in MB.3 will be evaluated as follows:

- Academic qualifications / other qualifications / training / certifications / publications / awards and memberships relevant to public opinion research (POR) fieldwork management as described in MB.3. **(Maximum 30 points)**
- Work experience – For each Survey Field Manager proposed, the Offeror should identify:
 - a. the total number of years of public opinion research experience; and
 - b. the total experience of each survey field manager proposed should be broken down by year / organization / role and include a brief description of how the work relates to POR. **(Maximum 70 points)**

The qualifications of each survey field manager of the proposed team will be evaluated on the basis of 100 points. An average score of all proposed survey field manager(s) will be calculated.

To facilitate the evaluation process the Offeror should use the qualifications template included as Appendix “4”, however, Offerors can also submit a Curriculum Vitae which cover all requested information.

RB.2 Field Staff Project Experience (Minimum 200 points – Maximum 250 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) telephone POR projects completed in Canada by the Offeror’s proposed field staff identified in MB.4. Each project will have been completed in Canada with a minimum of one thousand (1000) survey completions using random digit dialing and involving a minimum survey duration of five (5) minutes. The projects cited in MB.5 can be resubmitted for this rated criterion provided they meet all the elements required in RB.2. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Aboriginals, ethno cultural groups, seniors, youth, general population, etc), as long as the project was conducted in Canada with Canadians.

Project experience will be evaluated based on the criteria listed below:

- The project fieldwork was completed in the last seven (7) years of the bid closing date. **(Maximum 50 points)**
- There were at least one thousand (1000) survey completions using random digit dialing and involving minimum survey duration of at least five (5) minutes. **(Maximum 100 points)**
- Fieldwork was conducted in more than one province or territory. **(Maximum 100 points)**

The Offeror should use the following layout to describe each project:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Methodology including:
 - the number and characteristics of respondents;
 - questionnaire duration;
 - data collection method used;
 - sample design (demonstrating use of quotas or stratified probability sampling);
 - and
- Fieldwork location by Canadian province/territory.

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided.

An average score of all proposed field staff projects will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points.

RB.3 Survey Field Manager Project Experience (Minimum 200 points – Maximum 250 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) telephone POR projects completed in Canada by each survey field manager identified in MB.3. Each project will have been completed in Canada with a minimum of one thousand (1000) survey completions using random digit dialing and involving a minimum survey duration of five (5) minutes. The role of the survey field manager defined in MB.3 should be detailed. Details of any project experience in the curriculum vitae or qualifications template will not be evaluated for the purpose of this criterion. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Aboriginals, ethno cultural groups, seniors, youth, general population, etc), as long as the project was conducted in Canada with Canadians.

Project experience will be evaluated based on the criteria listed below.

- Project fieldwork was completed in the last seven (7) years of the bid closing date. **(Maximum 50 points)**
- There were at least one thousand (1000) survey completions using random digit dialing and involving minimum survey duration of at least five (5) minutes. **(Maximum 100 points)**
- The role of the Survey Field Manager is commensurate with the role described in MB.3. **(Maximum 100 points)**

The Offeror should use the following layout to describe each proposed project:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Methodology including:
 - the number and characteristics of respondents;
 - questionnaire duration;
 - data collection method used;
 - sample design (demonstrating use of quotas or stratified probability sampling);
- Fieldwork location by Canadian province/territory; and
- Roles (not organizational titles) performed by the proposed Survey Field Manager (provide details, client liaison, supervision of the programming, etc.).

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided.

An average score of all the proposed survey field managers will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points.

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**OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR RB.1, RB.2, AND RB.3
OF THE POINT RATED TECHNICAL CRITERIA FOR SERIES B
WILL BE GIVEN NO FURTHER CONSIDERATION.**

STEP 2:

RB.4 Sample Project (Minimum 152 points - Maximum 190 points)

The Offeror should submit a proposal based on the example statement of work and instructions provided in order to be considered for Series B: Fieldwork and Data Tabulation for Telephone Surveys.

Research projects conducted and contracted under these Standing Offers will vary in size, complexity and subject. Offerors are required to provide a proposal that demonstrates their preparedness to conduct the following fictitious project within a 3 week deadline. The proposed study will not be contracted and Offerors' proposals in relation to this study will be used exclusively for purposes of evaluation in the context of this Request for Standing Offer (RFSO).

Here are the details of the sample project:

Statement of Work

Client: Government of Canada

Title: Evaluation of the Government of Canada Services Advertising Campaign

Background:

This research is being conducted according to the Communications Policy of the Government of Canada which states the following objective: "Consult the public, listen to and take account of people's interests and concerns when establishing priorities, developing policies, and planning programs and services," "Ensure that institutions of the Government of Canada are visible, accessible and accountable to the public they serve," and "Identify and address communication needs and issues routinely in the development, implementation and evaluation of policies, programs, services and initiatives."

The Procedures for the Management of Advertising, <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28041> requires all advertising campaigns over \$1 million in total media buy be evaluated using the Advertising Campaign Evaluation Tool (ACET) (Annex "H").

Requirement:

The Offeror is required to demonstrate how they would complete 2000 landline telephone interviews with the general public (18 years of age and older) using the ACET questionnaire (Annex "H"), with an average survey duration of about seven (7) minutes via random digit dialing (RDD). No questionnaire design or data analysis is required.

The Offeror is required to describe a quantitative field and tabulation methodology based on a 3 week timeframe. The research includes the following requirements:

- Client liaison and project management;
- Register the survey with the National Survey Registration System;

- Program the ACET questionnaire in a computer-assisted telephone interviewing (CATI) system, or otherwise reproducing the questionnaire for interviewers;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole at the end of the survey; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Train and instruct interviewers;
- Purchase and administer a probability based sample (RDD);
- Ensuring fieldwork commences 1-3 days prior to the end of the campaign;
- Undertake data collection within a 10 calendar day period, with approximately 200 interviews roughly proportional to the overall sample distribution conducted each day;
- Use random digit dialing to achieve 2000 completed telephone interviews with quotas from the following age groups: 18-34 - 28%; 35-54 - 39% and 55+ - 33%;

Achieve the following soft-quotas based on following distribution range:

Region	Sample
Atlantic	140-180
Quebec	460-520
Ontario	560-760
Manitoba/Saskatchewan	140-180 (10 interviews in Nunavut)
Alberta	220-260 (10 interviews in NWT)
British Columbia	260-300 (10 interviews in Yukon)
TOTAL	2000

Note: Deviation from this proposed distribution is permitted so long as the information is collected among all six regions and will permit weighting the data at a regional level.

- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Make a minimum of 8 call backs;
- Ensure effective quality control measures;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Provide an oral briefing on the fieldwork status;
- Data entry of results;

-
- Data is to be stored on Canadian servers and Canadian back-up servers. The data must be located and only accessible in Canada. It must be physically independent from all other databases, directly or indirectly, that are located outside of Canada;
 - All aspects of data processing must be conducted and only accessible in Canada;
 - Provide the Project Authority with unweighted and weighted partial results during fieldwork;
 - Create frequencies and cross tabulation tables and coding procedures defined in consultation with the Project Authority;
 - Code the data;
 - Clean and weight the data;
 - Provide unweighted and weighted frequencies immediately following completion of fieldwork;
 - Provide fully labelled and cleaned SPSS dataset (including full variable and value labels as well as weighting variables), including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Prepare a draft methodology report, including executive summary (no analysis) in English. The report will include the reporting elements as detailed in the reporting requirements (Annex "E");
 - Finalize the methodology report;
 - Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "E"); and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.
- When Offerors are preparing their responses they should keep in mind:
 - *Library and Archives of Canada Act* <http://laws-lois.justice.gc.ca/eng/acts/L-7.7/>
 - Public Opinion Research Contract Regulations. <http://laws-lois.justice.gc.ca/eng/regulations/SOR-2007-134/page-1.html>
 - Communications Policy of the Government of Canada <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12316>
 - Procedures for the Management of Public Opinion Research <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28033>
 - The Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys (Annex "G")
 - Marketing Research and Intelligence Association (MRIA) Code of Conduct and Good Practice <http://mria-arim.ca/sites/default/uploads/files/MRIAConduct-Dec2007REV2010.pdf>
 - Public Opinion Research Final Report: Requirements and General Advice (Annex "E")

Offeror's response to the sample project:

The Offeror will provide details and will be evaluated on the following items:

1. Understanding of the project requirement; **(5 points)**
2. A description of the methodology including the following details:
 - a. Sample plan with associated margin of error; **(5 points)**
 - b. The level of interviewer training and supervision; **(5 points)**

- c. The number of dedicated CATI systems to be used for this project; and **(5 points)**
- d. A discussion of the expected response rate using the empirical method of calculation as recommended by the Marketing Research and Intelligence Association and how the Offeror proposes to deal with high refusal rates. **(10 points)**
- 3. All quality control measures taken by the Offeror to ensure the accuracy of their data collection and verification procedures including:
 - a. data input as well as data validity and integrity checks; and **(5 points)**
 - b. editing and coding procedures including methods used to assure inter-coder reliability. **(10 points)**
- 4. Information and variables to be contained in the data tables; **(10 points)**
- 5. Potential challenges or problems the Offeror may face in conducting the work and how the Offeror would address them. This includes:
 - a. A description of measures planned by the Offeror to meet the required age quotas, particularly with the 18-34 youth age group in the case of landline telephone surveys and proposed steps to reduce reliance on weighting required; **(30 points)**
 - b. The merits and challenges associated with including or excluding a sample of cell-phone households; **(20 points)**
 - c. A discussion of the appropriateness of completing 8 call-back calls given the 10 day field timeframe and its impact on response rates **(20 points)**;
 - d. Steps proposed to minimize item non-response, in particular demographic questions on income and age; **(20 points)**
 - e. A description of how respondents who prefer to respond in the other Official language will be handled; particularly completing French interviews outside of Quebec and English interviews within Quebec; and **(25 points)**
 - f. Procedures employed to deal with respondents whose first language is neither English nor French. **(15 points)**
- 6. A detailed timetable for the quantitative research consistent with the 3 week timeframe. **(5 points)**

RB.5 Environmental Attributes (Minimum N/A – Maximum 10 points)

The Offeror should provide their existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); and their existing or proposed action plan for materials/equipment sourcing (e.g., intended use of recycled or reused products, waste management strategy, etc.).

2.3 FINANCIAL EVALUATION – SERIES B

A. HOURLY RATES FOR SERVICES

WEIGHTING

5. Survey Field Manager	4%
6. Translator	1%

B. RATES FOR INTERVIEWS (FIRM ALL INCLUSIVE LOT PRICE)

7. Rates for Landline Telephone Interviewing and Data Tabulation	20%
8. Rates for Incident Rate: Based on an Incident Rate of 90% or less	15%
9. Rates for Cell Phone Only Completions - Youth Aged 18 to 34	15%
10. Rates for Cell Phone Only Completions - General Population	15%
11. Rates for Landline Telephone Completions (N=1000 and N=2000) using the ACET questionnaire	30%

TOTAL 100%

The following tables are an example of how the total evaluated price, and the weighted pricing score will be calculated from the rates provided in the basis of payment.

Rates used in this example are for demonstration purposes only, and are not intended to reflect any expectations on behalf of the Government of Canada.

Step 1

Calculate the average value of all cells for the applicable tables of the basis of payment. Below is one table, for the purpose of this example.

TABLE B3.1.2 Fixed unit price for landline telephone individual interview completions with the adult general public, inclusive of data tabulation and methodological report.

Questionnaire duration in minutes	Initial Period of Standing Offer						Average value for each row
	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000	
5 minutes	20	30	30	30	30	40	\$30.00
6 minutes	25	27.5	30	30	32.5	35	\$30.00
7 minutes	35	35	35	35	35	35	\$35.00
8 minutes	35	35	35	35	35	35	\$35.00
9 minutes	35	35	35	40	40	40	\$37.50
10 minutes	38	39	40	40	41	42	\$40.00
11 minutes	37	38	39	41	42	43	\$40.00
12 minutes	40	40	40	45	45	45	\$42.50
13 minutes	35	40	42.5	47.5	50	55	\$45.00
14 minutes	45	45	45	45	45	45	\$45.00
15 minutes	45	47	49	51	53	55	\$50.00
20 minutes	50	50	50	50	50	50	\$50.00
Average value of all cells							\$40.00

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Step 2**A.1 HOURLY RATE CATEGORIES FOR THE INITIAL PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighting Factor
Survey Field Manager	\$70.00	4%	\$2.80
Translator	\$50.00	1%	\$0.50
TOTAL (A)			\$3.30

B.1 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE INITIAL PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Factor
Rates for Landline Telephone Interviewing and Data Tabulation (Average value of all cells)	\$40.00	20%	\$8.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$40.00	15%	\$6.00
ACET landline telephone completions (n=1000 and n=2000) average value of Fixed Unit Price for n=1000 and n=2000	\$40.00	30%	\$12.00
TOTAL (B)			\$38.00
TOTAL (A+B)			\$41.30

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Step 3**A.2 HOURLY RATE CATEGORIES FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$70.00	4%	\$2.80
Translator	\$50.00	1%	\$0.50
TOTAL (A)			\$3.30

B.2 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing and Data Tabulation (Average value of all cells)	\$40.00	20%	\$8.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$40.00	15%	\$6.00
ACET landline telephone completions (n=1000 and n=2000) average value of Fixed Unit Price for n=1000 and n=2000	\$40.00	30%	\$12.00
TOTAL (B)			\$38.00
TOTAL (A+B)			\$41.30

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Step 4**A.3 HOURLY RATE CATEGORIES FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$75.00	4%	\$3.00
Translator	\$55.00	1%	\$0.55
TOTAL (A)			\$3.55

B.3 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing and Data Tabulation (Average value of all cells)	\$45.00	20%	\$9.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$45.00	15%	\$6.75
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$45.00	15%	\$6.75
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$45.00	15%	\$6.75
ACET landline telephone completions (n=1000 and n=2000) average value of Fixed Unit Price for n=1000 and n=2000	\$45.00	30%	\$13.50
TOTAL (B)			\$42.75
TOTAL (A+B)			\$46.30

Step 5**A.4 HOURLY RATE CATEGORIES FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Survey Field Manager	\$80.00	4%	\$3.20
Translator	\$60.00	1%	\$0.60
TOTAL (A)			\$3.80

B.4 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing and Data Tabulation (Average value of all cells)	\$50.00	20%	\$10.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$50.00	15%	\$7.50
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$50.00	15%	\$7.50
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$50.00	15%	\$7.50
ACET landline telephone completions (n=1000 and n=2000) average value of Fixed Unit Price for n=1000 and n=2000	\$50.00	30%	\$15.00
TOTAL (B)			\$47.50
TOTAL (A+B)			\$51.30

Step 6

PERIODS	TOTAL (A+B)
Initial Period of the Standing Offer (\$41.30 x 3)	\$123.90*
First Option Period of the Standing Offer	\$41.30
Second Option Period of the Standing Offer	\$46.30
Third Option Period of the Standing Offer	\$51.30
TOTAL EVALUATED PRICE	\$262.80

*= Please note that the Total (A+B) for the Initial period of the Standing Offer will be multiplied by 3 for the purpose of the financial evaluation.

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Step 7- To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.

$$\frac{\text{Lowest Responsive Evaluated Price}}{\text{Offeror's Evaluated Price}}$$

X 20 % = Weighted Pricing Score

OFFERORS	TOTAL EVALUATED PRICE	WEIGHTED PRICING SCORE
OFFEROR A	\$262.80	17.50
OFFEROR B	\$260.00	17.69
OFFEROR C	\$255.00	18.04
OFFEROR D	\$280.00	16.43
OFFEROR E	\$277.00	16.61
OFFEROR F	\$310.00	14.84
OFFEROR G	\$330.00	13.94
OFFEROR H	\$315.00	14.60
OFFEROR I	\$300.00	15.33
OFFEROR J	\$230.00	20.00
OFFEROR K	\$350.00	13.14
OFFEROR L	\$425.00	10.82
OFFEROR M	\$375.00	12.27
OFFEROR N	\$400.00	11.50
OFFEROR O	\$345.00	13.33

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2.4 TECHNICAL MERIT SCORE

The example demonstrates how the technical merit score will be calculated.

To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows:

$$\frac{\text{Total number of points obtained}}{\text{Maximum number of points available}} \times 80 \% = \text{Weighted Technical Score}$$

Scores used in this example are for demonstration purposes only.

OFFERORS	TOTAL NUMBER OF POINTS OBTAINED (OUT OF 800 points)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)
OFFEROR A	710	71
OFFEROR B	730	73
OFFEROR C	705	70.5
OFFEROR D	750	75
OFFEROR E	790	79
OFFEROR F	700	70
OFFEROR G	780	78
OFFEROR H	700	70
OFFEROR I	690	69
OFFEROR J	640	64
OFFEROR K	780	78
OFFEROR L	670	67
OFFEROR M	725	72.5
OFFEROR N	770	77
OFFEROR O	745	74.5

2.5 COMBINED RATING

The example demonstrates how the final combined rating will be calculated.

The technical merit score and the pricing score will be added to determine its combined rating.

Scores used in this example are for demonstration purposes only.

OFFERORS	WEIGHTED FINANCIAL SCORE (OUT OF 20 POINTS)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)	COMBINED RATING (OUT OF 100 POINTS)	RANKING OF COMBINED RATING
OFFEROR A	17.50	71	88.50	7
OFFEROR B	17.69	73	90.69	5
OFFEROR C	18.04	70.5	88.54	6
OFFEROR D	16.43	75	91.43	3
OFFEROR E	16.61	79	95.61	1
OFFEROR F	14.84	70	84.84	10
OFFEROR G	13.94	78	91.94	2
OFFEROR H	14.60	70	84.60	12
OFFEROR I	15.33	69	84.33	13
OFFEROR J	20.00	64	84.00	14
OFFEROR K	13.14	78	91.14	4
OFFEROR L	10.82	67	77.82	15
OFFEROR M	12.27	72.5	84.77	11
OFFEROR N	11.50	77	88.50	8
OFFEROR O	13.33	74.5	87.83	9

Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Series, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer for each Series.

In the example above, Offerors A, B, C, D, E, F, G, K, N, and O would be recommended for issuance of a Standing Offer. Offerors H, I, J, L, and M would not be recommended for issuance of a Standing Offer.

3. TECHNICAL EVALUATION – SERIES C (QUALITATIVE RESEARCH)

SERIES C: QUALITATIVE RESEARCH

3.1 MANDATORY TECHNICAL CRITERIA – SERIES C

MC.1 Corporate Profile

The Offeror must submit a corporate profile detailing:

- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities (e.g. in-house or subcontracted services);
- A copy of the firm's Privacy Policy.

MC.2 Offeror's Submission – Series

Offerors must complete Appendix "1" – Offer's Submission – Series in order to identify for which serie(s) they are providing the required services.

MC.3 Client Liaison

The Offeror must identify one (1) individual who they propose to act as client liaison in English and one (1) individual to act as client liaison in French. The Offeror must submit the language profile for each proposed individual. The individual identified for each language can be the same person. The Client Liaison does not need to be a senior researcher, but must have knowledge of POR.

MC.4 Senior Researcher

The Offeror must identify a minimum of two (2) senior qualitative researchers who they propose to design research, conduct fieldwork, analyze results, and write reports.

MC.5 Bilingual Capabilities - Senior Researcher

The Offeror must identify:

- A minimum of one (1) senior researcher who can conduct fieldwork in English;
- and

- A minimum of one (1) senior researcher who can conduct fieldwork in French.

The senior researchers must be from the list of senior researchers named in MC.4. The senior researchers identified for each language can be the same person. They must have sufficient language proficiency in the official language for which they are proposed to both easily understand and be understood by all research participants.

- For each senior researcher identified to conduct fieldwork in English or French the Offeror must provide two (2) qualitative POR projects in that official language. Projects in which the same senior researcher conducted the fieldwork in both official languages count as one English and one French project.
- For each project, the senior researcher must have conducted at least two group sessions (each group session involving 3 or more participants) or six (6) individual interviews, using in-person or telephone or Internet voice techniques in the language for which they are proposed.
- The fieldwork of the projects must have been completed in the last seven (7) years as of the bid closing date.

Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

MC.6 Basis of Payment

The Offeror must provide rates for the initial period and each of the option periods of the Standing Offer in accordance with Annex "B4" - Basis of Payment, Series C – Qualitative Research.

If pricing is not provided for a component, a price of zero will be assigned for the component and the Offeror will be provided an opportunity to agree with the zero amount.

If the Offeror agrees then the Basis of Payment will be considered compliant. However, if the Offeror disagrees, then the proposal will be found non-compliant and no further evaluation will be done.

OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION

3.2 POINT RATED TECHNICAL CRITERIA – SERIES C (Maximum 800 points)

THE POINT RATED TECHNICAL CRITERIA – SERIES C WILL BE EVALUATED IN THE FOLLOWING ORDER:

STEP 1: RC.1 AND THEN RC.2.

STEP 2: RC.3 AND THEN RC.4

OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR ANY OF THE RATED CRITERIA IN STEP 1 WILL NOT PROCEED TO STEP 2.

STEP 1:

RC.1 Senior Researcher Qualifications (Minimum 80 points – Maximum 100 points)

The qualifications of each Senior Researcher proposed in MC.4 and MC.5 will be evaluated as follows:

- Academic qualifications / other qualifications / training / certifications / publications / awards and memberships relevant to design, conduct and reporting of public opinion research. **(Maximum 30 points)**
- Work experience – For each Senior Researcher proposed, the Offeror should identify:
 - a. the total number of years of public opinion research experience; and
 - b. the total experience of each Senior Researcher proposed should be broken down by year / organization / role and include a brief description of how the work relates to POR. **(Maximum 70 points)**

The qualifications of each Senior Researcher of the proposed team will be evaluated on the basis of 100 points. An average score of all proposed Senior Researcher(s) will be calculated.

To facilitate the evaluation process the Offeror should use the qualifications template included as Appendix “4”, however, Offerors can also submit a Curriculum Vitae which cover all requested information.

RC.2 Senior Researcher Project Experience (Minimum 400 points – Maximum 500 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) qualitative POR projects completed in Canada with the Canadian adult general public or sub-groups of the Canadian adult population by each senior researcher identified in RC.1 above. The subject matter of the projects should be related to quality of service, communication, advertising, Web sites or policy and programs. Details of any project experience in the Curriculum Vitae or qualifications template will not be evaluated for the purpose of this criterion.

The projects cited in MC.5 can be resubmitted for this rated criterion provided they meet all the elements required in RC.2. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. aboriginals, ethno cultural groups, seniors, youth, general population, etc.), as long as the project was conducted in Canada with Canadians.

Project experience will be evaluated based on the criteria listed below:

- The target audience of the project was with the Canadian adult general public or sub-groups of the Canadian adult population. **(Maximum 100 points)**
- The fieldwork was completed in the last seven (7) years of the bid closing date. **(Maximum 100 points)**
- The subject matter of the projects should be related to quality of service, communication, advertising, Web sites or policy and programs. **(Maximum 100 points)**
- The senior researcher conducted at least two group sessions (each involving 3 or more participants) or six individual interviews. **(Maximum 100 points)**
- The senior researcher performed a significant role in the 1) design; and 2) analysis or reporting for the component of the study. **(Maximum 100 points)**

The Offeror should use the following layout to describe each senior researcher's project experience:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Research subject matter including main objectives;
- Methodology including:
 - the number and characteristics of participants,
 - method used,
- Fieldwork location by Canadian province/territory;
- Roles (not organizational titles) performed by the proposed senior researcher (provide details, e.g. role in design of research instruments, number of groups/interviews conducted, etc.).

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided.

An average score of all the proposed Senior Researchers will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points. Submitting less projects than the requested minimum and/or projects which do not fully meet all these criteria will result in a lower total score.

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**OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR RC.1 AND RC.2
OF THE POINT RATED TECHNICAL CRITERIA FOR SERIES C
WILL BE GIVEN NO FURTHER CONSIDERATION.**

STEP 2:

RC.3 Sample Project (Minimum 152 points - Maximum 190 points)

The Offeror should submit a proposal based on the example statement of work and instructions provided in order to be considered for Series C: Qualitative Research.

Research projects conducted and contracted under these Standing Offers will vary in size, complexity and subject. Offerors are required to provide a methodology and work plan that demonstrates their preparedness to conduct the following project within set deadlines and budgets.

Within the maximum budget specified below, Offerors are required to describe how the proposed team will design, conduct, analyse and present the results in both official languages of the public opinion research study described below. Offerors should note that both the study proposed and the "context" described are fictitious and have been included for the purposes of evaluation only. The proposed study will not be contracted and Offerors' proposals in relation to this study will be used exclusively for purposes of evaluation in the context of this RFSO. However, Offerors should ground their proposals in real-world assessments of the size and nature of the populations and sub-populations to be studied.

Here are the details of the sample project:

Statement of Work

Client: Canadian Response Agency (a fictitious organisation)

Title: Qualitative Research on Middle East Respiratory Syndrome Emergency
Contingency Planning

Time frame and Budget (travel and applicable taxes included):

Qualitative Research:	8 weeks	\$75,000.00
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Background:

Over the past decade, Canada has faced a number of respiratory outbreaks, from Severe Acute Respiratory Syndrome (SARS) to bouts with H1N1 (Swine Flu) and H1N5 (Bird Flu). Recently, Middle East Respiratory Syndrome (MERS) has made its way into North America, with several cases verified in the United States. With many Canadians travelling for business and pleasure the inter-country spread of MERS is a possibility.

Past outbreaks, especially SARS, required exceptional response from health care providers, placed very large demands on the front-line personnel who provided care to patients including exposing them to life-threatening risks, and involved significant public health measures among them quarantines and the screening of travellers entering Canada. Therefore, the Government of Canada is undertaking contingency planning for possible MERS outbreaks in Canada. Such contingency plans must consider the possibility of a larger and more deadly epidemic.

Planning for response to epidemic disease must consider a wide range of potential implications. While SARS resulted in a significant number of fatalities, it was largely limited to health-care settings, affecting mainly people who came into close contact with the diseases in these settings. In the end, and with the exception of some identified patients who appeared particularly likely to spread the disease, rates of SARS transmission were low. According to Centers for Disease Control (CDC), MERS fatality rates are 30%, this compared to only 10% with SARS. Were an epidemic of MERS to emerge in Canada, the challenges associated with caring for and treating those affected would be much greater and the measures required to contain the spread of disease much more severe.

In general terms, Response Planning for a disease epidemic seeks to ensure that the key players who would be required to implement, coordinate, and execute a response know the roles that they will play and have sufficient knowledge and resources to act appropriately. Response Planning also seeks to ensure that the larger population is sufficiently well informed that they will act prudently and cautiously if an epidemic occurs, and will support and co-operate in the implementation of the public health measures required to control the spread of disease.

Research objectives:

As part of this planning, it is anticipated that information campaigns will be developed to improve awareness of appropriate responses to an epidemic disease in different segments of the population. Although some outbreaks are more localized the ramifications could impact all of Canada.

Public opinion research (POR) is required to assist in the development of all aspects of the plans, both the action/response planning and the proposed information campaign. The focus of the proposed POR is on:

- awareness, knowledge and attitudes relevant to minimizing exposure to disease during such an epidemic;
- awareness, knowledge and attitudes relevant to minimizing the spread of disease in the community;
- awareness, knowledge and attitudes related to safeguarding the health of the Canadian population;
- opinions about the emergency measures that might be needed to contain the spread of disease; and
- among the special "front-line" populations, evaluations of and knowledge of disease risk and preparedness to undertake action in the face of risk.

Methodology:

Offerors are to assume that the:

- **Qualitative research will be exploratory and will seek to obtain a solid understanding of existing levels of awareness, knowledge and attitudes towards possible epidemic disease, and attitudes towards possible precautionary measures and possible responses in order to develop hypotheses that can be tested through the quantitative component (This point should be taken into consideration when submitting for Series C-qualitative research).**
- **Quantitative research will be used to test program options and elements of a communication strategy. The research will be used as a benchmark and**

to evaluate the success and effectiveness of communications initiatives that will be implemented after this initial research. Therefore the survey component will require reliable data that is representative of the survey population. (Note: this information is provided to give context to the research question, no quantitative work has to be provided if Offeror is submitting for Series C- qualitative research only).

Target populations:

The hypothetical POR project described is targeted at two distinct populations, "front line personnel" whose activities would be vital in the response to an epidemic, and the general public, whose actions and support would be critical both directly to the containment of the spread of disease and indirectly through acceptance and support for the control measures required for the treatment of people infected, and for containment.

The specific populations of interest for the hypothetical research project are as follows:

- (a) The Canadian public aged eighteen and over;
 - Including retired Canadians "snowbirds" who plan to vacation in the United States, particularly Florida.
 - Including families with children likely to vacation in Florida.
- (b) Health sector workers, particularly those who would be "front line" personnel in the medical response;
- (c) Police officers who would be called upon to assist in the implementation of containment measures and in the maintenance of public order;
- (d) Military personnel who, in extreme situations, would be called upon to assist with emergency measures;

Table 1 below provides estimates of the numbers of people in each of these segments of the population. Offerors may revise these estimates based on alternate or more detailed sources on information if they so choose.

TABLE 1: POPULATIONS TO BE CONSIDERED

POPULATION		ESTIMATED NUMBER	INFORMATION TAKEN FROM
(a) [2011]	Canadian public aged eighteen and over	26,579,015	Population by sex and age group, 2011 Census of Population, Statistics Canada Catalogue no. 98-311-XCB2011023
[2013]	Canadians spending extended time out of Canada (up to 183 days in a 12 month period)	70,000	Canadian snowbird Association* To be used as a guide, not a complete reference
[2011]	All families with children at home	5,637,135	Families in private households and presence of children, 2011 Census of

			Population, Statistics Canada Catalogue no.98- 312-XCB
(b) [2006]	Health Occupations	950,360	Experienced labour force 15 years and over by occupation , Statistics Canada, 2006 Census of Population
[2014]	Physicians	74,788	Number of Physicians by Province/Territory and Specialty, Canada 2014 , Masterfile, Jan 2014, Canadian Medical Association (CMA)
[2011]	Nurses (registered nurses (RNs), licensed practical nurses (LPNs) and registered psychiatric nurses (RPNs))	270,724	Registered Nursing Workforce, by Jurisdiction, Canada, 2007 to 2011 Canadian Institute for Health Information. Regulated Nurses: Canadian Trends (Table 3)
[2011]	Other health sector workers (Paramedics, Respiratory Therapists, Medical Laboratory Technologists, Environmental Public Health Professionals)	68,339	Final count not complete, as it may include other professions.*To be used as a guide, not a complete reference Health Personnel Database, Canadian Institute for Health Information.
(c) [2013]	Police officers	69,272	Police officers, provinces and territories , Statistics Canada, CANSIM, table 254-0002
(d) [2011]	Military personnel	93,914	Military personnel and pay , Statistics Canada, CANSIM, table 183-0004 & Catalogue no 68-213-XIB

Cautions: *Numbers in the table above have been assembled from different sources and collection methods vary between sources. The estimate of total health occupations includes those in the age group 15-17. Also note the variations in the years to which the numbers refer. Numbers are provided as an aid in proposing a sampling plan. Offerors may substitute estimates if they believe alternate estimates are more accurate.*

While all of the populations listed are of interest, the research plan proposed may need to make strategic choices in relation to (a) the populations that can be effectively covered within the budget and (b) the type of techniques that are practical given the populations, the ease/difficulty of doing research with them, and the suitability of given techniques to each population. These constraints may lead Offerors to make strategic choices between the populations including possibly the exclusion of one or more populations or inclusion of an audience not identified in Table 1. Offerors should provide a rationale of these choices as part of their proposal for the sample project.

Requirements:

Offerors should assume that they would be required to undertake the following activities for the qualitative research plan:

- Up to 2 meetings (in person or by phone) with the Project Authority to discuss design issues, recruitment, administrative requirements, locations and schedule for each study; Offeror should assume that the client is a senior manager, but not a researcher;
- Develop all research instruments (recruitment screener(s) and interview/moderator's guide(s)), submit for approval, revise as necessary and translate all research instruments in the other official language;
- Organize field work, including recruitment of research participants/interviewees, facilities and scheduling;
- Inform respondents of their rights under the *Privacy Act, Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act, the Access to Information Act, and any other pertinent legislation*;
- Conduct fieldwork and provide oral progress report on recruitment and fieldwork as requested;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada;
- Assume that any or all research sessions would be observed by 2 client representatives and that videotaping and simultaneous interpretation will not be required; however, tape transcripts (no personal identifiers) is required and the cost of transcription should be included in the costing for the sample project;

- Provide an outline of the final report(s);
- Analyze the collected data, submit draft report(s) in one official language for approval and revise as necessary;
- Prepare and deliver a bilingual PowerPoint presentation(s) of key findings;
- Finalize the report(s) in one language; the report should contain key findings, summary, conclusions and recommendations and appendices containing all research instruments in both official languages; translation of the report(s) in the other official language will be the responsibility of the Project Authority; please see Annex "E" for a full list of reporting requirements including regulations, policy requirements, procedures, and a template for the cover page of the final report;
- Provide two bound copies, one unbound and an electronic copy of the final report(s); and
- Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

When Offerors are preparing their responses they should keep in mind:

- *Library and Archives of Canada Act* <http://laws-lois.justice.gc.ca/eng/acts/L-7.7/>
- Public Opinion Research Contract Regulations <http://laws-lois.justice.gc.ca/eng/regulations/SOR-2007-134/page-1.html>
- Communications Policy of the Government of Canada <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12316>
- Procedures for the Management of Public Opinion Research <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28033>
- Marketing Research and Intelligence Association (MRIA) Code of Conduct and Good Practice <http://mria-arim.ca/sites/default/uploads/files/MRIACoconduct-Dec2007REV2010.pdf>
- Public Opinion Research Final Report: Requirements and General Advice (Annex "E")

Offeror's response to the sample project:

Offerors are required to describe a qualitative methodology based on the research objectives, budget and timeframe for the qualitative research plan identified above. The research description will be evaluated based on the following details:

1. Understanding of the project requirement **(5 points)**
2. An explanation of how the qualitative research will serve research objectives **(10 points)**;
3. A description of the methodology including the following details:
 - a. The identification and description of the target populations that will be included in the qualitative studies and the qualitative methodologies and research techniques (including new or non-traditional methodologies falling under the definition of POR) that will be used to elicit information from each target population; **(25 points)**
 - b. A rationale for the approach to the qualitative studies and a justification of the design choices proposed, particularly the rationale for decisions concerning the selection and/or exclusion of elements of the target audiences, the appropriateness

of the qualitative techniques proposed, taking into account the specific needs and characteristics of the target audiences; **(35 points)**

- c. Details on the number of participants/interviewees including how they will be selected and recruited, incentives, research locations and facilities, duration of research sessions and schedule; **(10 points)**
 - d. Details on the Offeror's capabilities and procedures for data collection (either in-house or subcontracted), including research facilities used; details on all aspects of recruitment including screening specifications, information on recruiters, bilingual capability of recruiters, recruitment methods/source and standards, procedures for confirmation, replacement, and any other quality control procedures used throughout a qualitative project; **(25 points)**
 - e. The control mechanisms the Offeror will use to ensure the presence of recruited participants at research sessions; **(10 points)**
4. A list of topics proposed for each target population selected; **(30 points)**
 5. A description of potential challenges/problems they may face during the project and how they would address them; **(15 points)**
 6. An outline of the analysis of the qualitative data collected; **(15 points)**
 7. A description of reporting requirements to be met, including all items to be contained on the cover page, in the executive summaries, the main points of the final report, and items to be included in the appendices. See Annex "E"; and **(5 points)**
 8. A detailed timetable and breakdown of costs for the qualitative research consistent with the timeframe, budget, and proposed pricing grids submitted in accordance to Annex "B4" – Series C (Qualitative Research). **(5 points)**

RC.4 Environmental Attributes (Minimum N/A – Maximum 10 points)

The Offeror should provide their existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); and their existing or proposed action plan for materials/equipment sourcing (e.g., intended use of recycled or reused products, waste management strategy, etc.).

3.3 FINANCIAL EVALUATION – SERIES C

A. HOURLY RATE CATEGORIES

Category of Service	Weighting Factor
Senior Researcher	50%
Client Liaison	10%
Field Supervisor	5%
Field Manager	5%
Interviewer/Recruiter	20%
Programmer	5%
Translator	5%
TOTAL	100%

The following tables are an example of how the total evaluated price, and the weighted pricing score will be calculated from the rates provided in the basis of payment.

Rates used in this example are for demonstration purposes only, and are not intended to reflect any expectations on behalf of the Government of Canada.

Step 1

Initial Period of the Standing Offer			
Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$100.00	50%	\$50.00
Client Liaison	\$80.00	10%	\$8.00
Field Supervisor	\$20.00	5%	\$1.00
Field Manager	\$20.00	5%	\$1.00
Interviewer/Recruiter	\$20.00	20%	\$4.00
Programmer	\$20.00	5%	\$1.00
Translator	\$20.00	5%	\$1.00
		Total	\$66.00

Step 2

First Option Period of the Standing Offer			
Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$105.00	50%	\$52.50
Client Liaison	\$85.00	10%	\$8.50
Field Supervisor	\$22.00	5%	\$1.10
Field Manager	\$22.00	5%	\$1.10
Interviewer/Recruiter	\$22.00	20%	\$4.40
Programmer	\$22.00	5%	\$1.10
Translator	\$22.00	5%	\$1.10
		Total	\$69.80

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Step 3

Second Option Period of the Standing Offer			
Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$105.00	50%	\$52.50
Client Liaison	\$85.00	10%	\$8.50
Field Supervisor	\$22.00	5%	\$1.10
Field Manager	\$22.00	5%	\$1.10
Interviewer/Recruiter	\$22.00	20%	\$4.40
Programmer	\$22.00	5%	\$1.10
Translator	\$22.00	5%	\$1.10
		Total	\$69.80

Step 4

Third Option Period of the Standing Offer			
Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$110.00	50%	\$55.00
Client Liaison	\$90.00	10%	\$9.00
Field Supervisor	\$25.00	5%	\$1.25
Field Manager	\$25.00	5%	\$1.25
Interviewer/Recruiter	\$25.00	20%	\$5.00
Programmer	\$25.00	5%	\$1.25
Translator	\$25.00	5%	\$1.25
		Total	\$74.00

Step 5

PERIODS	TOTALS
Initial Period of the Standing Offer (\$66.00 x 3)	\$198.00*
First Option Period of the Standing Offer	\$69.80
Second Option Period of the Standing Offer	\$69.80
Third Option Period of the Standing Offer	\$74.00
TOTAL EVALUATED PRICE	\$411.60

*= Please note that the Total for the Initial period of the Standing Offer will be multiplied by 3 for the purpose of the financial evaluation.

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Step 6- To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.

$$\frac{\text{Lowest Responsive Evaluated Price}}{\text{Offeror's Total Evaluated Price}}$$

X 20 % = Weighted Pricing Score

OFFERORS	TOTAL EVALUATED PRICE	WEIGHTED PRICING SCORE
OFFEROR A	\$411.60	18.22
OFFEROR B	\$630.00	11.90
OFFEROR C	\$440.00	17.05
OFFEROR D	\$550.00	13.64
OFFEROR E	\$430.00	17.44
OFFEROR F	\$479.00	15.66
OFFEROR G	\$550.00	13.64
OFFEROR H	\$410.00	18.29
OFFEROR I	\$520.00	14.42
OFFEROR J	\$535.00	14.02
OFFEROR K	\$665.00	11.28
OFFEROR L	\$400.00	18.75
OFFEROR M	\$459.00	16.34
OFFEROR N	\$375.00	20.00
OFFEROR O	\$493.00	15.21

3.4 TECHNICAL MERIT SCORE

The example demonstrates how the technical merit score will be calculated.

To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows:

$$\frac{\text{Total number of points obtained}}{\text{Maximum number of points available}} \times 80 \% = \text{Weighted Technical Score}$$

Scores used in this example are for demonstration purposes only.

OFFERORS	TOTAL NUMBER OF POINTS OBTAINED (OUT OF 800 points)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)
OFFEROR A	720	72
OFFEROR B	760	76
OFFEROR C	710	71
OFFEROR D	730	73
OFFEROR E	640	64
OFFEROR F	670	67
OFFEROR G	640	64
OFFEROR H	730	73
OFFEROR I	690	69
OFFEROR J	730	73
OFFEROR K	760	76
OFFEROR L	740	74
OFFEROR M	700	70
OFFEROR N	770	77
OFFEROR O	740	74

3.5 COMBINED RATING

The example demonstrates how the final combined rating will be calculated.

The technical merit score and the pricing score will be added to determine its combined rating.

Scores used in this example are for demonstration purposes only.

OFFERORS	WEIGHTED FINANCIAL SCORE (OUT OF 20 POINTS)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)	COMBINED RATING (OUT OF 100 POINTS)	RANKING OF COMBINED RATING
OFFEROR A	18.22	72	90.22	4
OFFEROR B	11.90	76	87.90	7
OFFEROR C	17.05	71	88.05	6
OFFEROR D	13.64	73	86.64	10
OFFEROR E	17.44	64	81.44	14
OFFEROR F	15.66	67	82.66	13
OFFEROR G	13.64	64	77.64	15
OFFEROR H	18.29	73	91.29	3
OFFEROR I	14.42	69	83.42	12
OFFEROR J	14.02	73	87.02	9
OFFEROR K	11.28	76	87.28	8
OFFEROR L	18.75	74	92.75	2
OFFEROR M	16.34	70	86.34	11
OFFEROR N	20.00	77	97.00	1
OFFEROR O	15.21	74	89.21	5

Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Series, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer for each Series.

In the example above, Offerors A, B, C, D, H, J, K, L, N, and O would be recommended for issuance of a Standing Offer. Offerors E, F, G, I, and M would not be recommended for issuance of a Standing Offer.

4. TECHNICAL EVALUATION – SERIES D (QUANTITATIVE RESEARCH)

SERIES D: QUANTITATIVE RESEARCH

4.1 MANDATORY TECHNICAL CRITERIA – SERIES D

MD.1 Corporate Profile

The Offeror must submit a corporate profile detailing:

- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities (e.g. in-house or subcontracted services);
- Number and locations of telephone stations (e.g. in-house or subcontracted services); and
- A copy of the firm's Privacy Policy.

MD.2 Offeror's Submission – Series

Offerors must complete Appendix "1" – Offer's Submission – Series in order to identify for which serie(s) they are providing the required services.

MD.3 Client Liaison

The Offeror must identify one (1) individual who they propose to act as client liaison in English and one (1) individual to act as client liaison in French. The Offeror must submit the language profile for each proposed individual. The individual identified for each language can be the same person. The Client Liaison does not need to be a senior researcher, but must have knowledge of POR.

MD.4 Senior Researcher

The Offeror must identify a minimum of one quantitative (1) senior researcher who they propose to design research, analyze results, and write reports.

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MD.5 Fieldwork Staff:

All field staff must be located in Canada. The Offeror must identify whether all fieldwork will be conducted with either:

- in-house resources;
- a sub-contractor; or
- a combination of in-house resources and a sub-contractor.

If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the Standing Offer unless authorized in writing by PWGSC.

In the case of the use of a sub-contractor, the Offeror must provide:

- The name of the sub-contractor;
- The number of years in business;
- Key contact information including the Offeror's:
 - contact name;
 - contact title;
 - business address;
 - telephone number; and
 - email address.
- Overview of products and services offered;
- Canadian field-staff capabilities;
- Number and locations of telephone stations; and
- A copy of the firm's Privacy Policy.

MD.6 Bilingual Capabilities - Fieldwork Staff

The Offeror must describe two (2) bilingual projects conducted with the Offerors proposed field staff, each with a minimum of 250 interviews completed in English and 250 interviews completed in French. The fieldwork of each project must have been completed in the last seven (7) years of the bid closing date

MD.7 Basis of Payment

The Offeror must provide rates for the initial period and each of the option periods of the Standing Offer in accordance with Annex "B5" - Basis of Payment, Series D – Quantitative Research.

If pricing is not provided for a component, a price of zero will be assigned for the component and the Offeror will be provided an opportunity to agree with the zero amount.

If the Offeror agrees, then the Basis of Payment will be considered compliant. However, if the Offeror disagrees, then the proposal will be found non-compliant and no further evaluation will be done.

OFFERS NOT MEETING ALL OF THE MANDATORY TECHNICAL CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION

4.2 POINT RATED TECHNICAL CRITERIA – SERIES D (Maximum 800 points)

THE POINT RATED TECHNICAL CRITERIA – SERIES D WILL BE EVALUATED IN THE FOLLOWING ORDER:

STEP 1: RD.1, RD.2, AND THEN RD.3.

STEP 2: RD.4 AND THEN RD.5

OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR ANY OF THE RATED CRITERIA IN STEP 1 WILL NOT PROCEED TO STEP 2.

STEP 1:

RD.1 Senior Researcher Qualifications (Minimum 80 points – Maximum 100 points)

The qualifications of each senior researcher proposed in MD.4 will be evaluated as follows:

- Academic qualifications / other qualifications / training / certifications / publications / awards and memberships relevant to the design, conduct and reporting of POR. **(Maximum 30 points)**
- Work experience – For each senior researcher proposed, the Offeror should identify:
 - a. the total number of years of overall POR experience; and
 - b. the total experience of each senior researcher proposed should be broken down by year/organization/role and include a brief description of how the work relates to POR. **(Maximum 70 points)**

The qualifications of each Senior Researcher of the proposed research team will be evaluated on the basis of 100 points. An average score of all the proposed senior researchers will be calculated.

To facilitate the evaluation process the Offeror should use the qualifications template included as Appendix “4”. Offerors can also submit a Curriculum Vitae which covers all requested information.

RD.2 Senior Researcher Project Experience (Minimum 200 points – Maximum 250 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) quantitative POR projects completed in Canada by each senior researcher identified in RD.1 above. The target audience of each project was with the Canadian adult general public or sub-groups of the Canadian adult population. The subject matter of the projects should be related to quality of service, communication, advertising, Web sites or policy and programs. Details of any project experience in the curriculum vitae or qualifications template will not be evaluated for the purpose of this criterion. The projects cited in MD.6 can be resubmitted for this rated criterion provided they meet all the elements required in RD.2. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. aboriginals, ethno cultural groups, seniors, youth, general population, etc.), as long as the project was conducted in Canada with Canadians

Project experience will be evaluated based on the criteria listed below:

-
- The target audience of the project was with the Canadian adult general public or sub-groups of the Canadian adult population. **(Maximum 25 points)**
 - The subject matter of the projects involved research in the following categories quality of service, communication, advertising, Web sites or policy and programs **(Maximum 50 points)**
 - There was at least one thousand (1000) interviews completed in which the population was Canadians and the questionnaire duration was at least five minutes. **(Maximum 100 points)**
 - The senior researcher performed a significant role in the design and analysis/reporting for the component of the study. **(Maximum 50 points)**
 - The fieldwork was completed recently, particularly in the last seven (7) years, as of the bid closing date. **(Maximum 25 points)**

The Offeror should use the following layout to describe each senior researcher's project experience:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Research subject matter including main objectives;
- Methodology including:
 - the number and characteristics of respondents;
 - questionnaire duration;
 - data collection method used;
- Fieldwork location by Canadian province/territory; and
- Roles (not organizational titles) performed by the proposed senior researcher (provide details, e.g. Role in design of research instruments, analysis of findings, etc.).

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided

An average score of all the proposed senior researchers will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points.

RD.3 Field Staff Project Experience (Minimum 200 points – Maximum 250 points)

The Offeror should identify and describe in detail a minimum of three (3) but no more than five (5) telephone POR projects completed in Canada by the Offeror's proposed field staff. These projects can include projects submitted in MD.6 provided all elements require in RD.3 are included. Relevant projects conducted for clients in or outside the Government of Canada (GC) will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Aboriginals, ethno cultural groups, seniors, youth, general population, etc.), as long as the project was conducted in Canada with Canadians.

Project experience will be evaluated based on the criteria listed below:

- the fieldwork was completed in the last seven (7) years of the bid closing date. **(Maximum 50 points)**
- there were at least one thousand (1000) survey completions and the questionnaire duration was at least five (5) minutes. **(Maximum 100 points)**
- Fieldwork must have been conducted in more than one province or territory. **(Maximum 100 points)**

The Offeror should use the following layout to describe each project:

- Project title;
- Fieldwork start and end dates (Month/Year);
- Client name and telephone number;
- Methodology including:
 - the number and characteristics of respondents;
 - questionnaire duration;
 - data collection method used; and
- Fieldwork location by Canadian province/territory.

Note: Failure to provide the above information may result in the project being rejected due to insufficient detail.

Canada reserves the right to contact client references in order to verify the accuracy of the information provided.

An average score of all the proposed field staff projects will be calculated.

Offers that supply the minimum number of projects requested, with all project descriptions fully meeting the above criteria, will be able to achieve a maximum of 80% of the available points. Projects that do not meet all these criteria will result in a lower total score. Offers that supply the maximum number of projects, with all project descriptions fully meeting these criteria, will be able to achieve a maximum of 100% of the available points.

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**OFFERS NOT MEETING THE REQUIRED MINIMUM SCORE FOR RD.1, RD.2, AND RD.3
OF THE POINT RATED TECHNICAL CRITERIA FOR SERIES D
WILL BE GIVEN NO FURTHER CONSIDERATION.**

STEP 2:

RD.4 Sample Project (Minimum 152 points - Maximum 190 points)

The Offeror should submit a proposal based on the example statement of work and instructions provided in order to be considered for Series D: Quantitative Research.

Research projects conducted and contracted under these Standing Offers will vary in size, complexity and subject. Offerors are required to provide a methodology and work plan that demonstrates their preparedness to conduct the following project within set deadlines and budgets.

Within the maximum budget specified below, Offerors are required to describe how the proposed team will design, conduct, analyse and present the results in both official languages of the POR study described below. Offerors should note that both the study proposed and the "context" described are fictitious and have been included for the purposes of evaluation only. The proposed study will not be contracted and Offerors' proposals in relation to this study will be used exclusively for purposes of evaluation in the context of this RFSO. However, Offerors should ground their proposals in real-world assessments of the size and nature of the populations and sub-populations to be studied.

Here are the details of the sample project:

Statement of Work

Client: Canadian Response Agency (a fictitious organisation)

Title: Quantitative Research on Middle East Respiratory Syndrome Emergency Contingency Planning

Time frame and Budget (travel and applicable taxes included):

Quantitative Research: 15 weeks \$125,000.00

Background:

Over the past decade, Canada has faced a number of respiratory outbreaks, from Severe Acute Respiratory Syndrome (SARS) to bouts with H1N1 (Swine Flu) and H1N5 (Bird Flu). Recently, Middle East Respiratory Syndrome (MERS) has made its way into North America, with several cases verified in the United States. With many Canadians travelling for business and pleasure the inter-country spread of MERS is a possibility.

Past outbreaks, especially SARS, required exceptional response from health care providers, placed very large demands on the front-line personnel who provided care to patients including exposing them to life-threatening risks, and involved significant public health measures among them quarantines and the screening of travellers entering Canada. Therefore, the Government of Canada is undertaking contingency planning for possible MERS outbreaks in Canada. Such contingency plans must consider the possibility of a larger and more deadly epidemic.

Planning for response to epidemic disease must consider a wide range of potential implications. While SARS resulted in a significant number of fatalities, it was largely limited to health-care settings, affecting mainly people who came into close contact with the diseases in these settings. In the end, and with the exception of some identified patients who appeared particularly likely to spread the disease, rates of SARS transmission were low. According to Centers for Disease Control (CDC), MERS fatality rates are 30%, this compared to only 10% with SARS. Were an epidemic of MERS to emerge in Canada, the challenges associated with caring for and treating those affected would be much greater and the measures required to contain the spread of disease much more severe.

In general terms, Response Planning for a disease epidemic seeks to ensure that the key players who would be required to implement, coordinate, and execute a response know the roles that they will play and have sufficient knowledge and resources to act appropriately. Response Planning also seeks to ensure that the larger population is sufficiently well informed that they will act prudently and cautiously if an epidemic occurs, and will support and co-operate in the implementation of the public health measures required to control the spread of disease. The hypothetical POR project described is targeted at two distinct populations, "front line personnel" whose activities would be vital in the response to an epidemic, and the general public, whose actions and support would be critical both directly to the containment of the spread of disease and indirectly through acceptance and support for the control measures required for the treatment of people infected, and for containment.

Research objectives:

As part of this planning, it is anticipated that information campaigns will be developed to improve awareness of appropriate responses to epidemic disease in different segments of the population. Although some outbreaks are more localized the ramifications could impact all of Canada.

Public opinion research (POR) to assist in the development of all aspects of the plans, both the action/response planning and the proposed information campaign. The focus of the proposed POR is on measurement of:

- awareness, knowledge and attitudes relevant to minimizing exposure to disease during such an epidemic;
- awareness, knowledge and attitudes relevant to minimizing the spread of disease in the community;
- awareness, knowledge and attitudes related to safeguarding the health of the Canadian population;
- opinions about the emergency measures that might be needed to contain the spread of disease; and
- Among the special "front-line" populations, evaluations of and knowledge of disease risk and preparedness to undertake action in the face of risk.

Methodology:

Offerors are to assume that the:

- **Qualitative research will be exploratory and will seek to obtain a solid understanding of existing levels of awareness, knowledge and attitudes towards possible epidemic disease, and attitudes towards possible precautionary measures and possible responses in order to develop hypotheses that can be tested through the quantitative component. (Note:**

this information is provided to give context to the research question, no qualitative work is required if the Offeror is submitting for Series D – quantitative research only).

- **Quantitative research will be used to test program options and elements of a communication strategy and will be used as a benchmark to evaluate the success and effectiveness of communications initiatives that will be implemented after this initial research. Therefore the survey component will require reliable data that is representative of the survey population. (This point should be taken into consideration when submitting for Series D- quantitative research).**

Target populations:

The specific populations of interest for the hypothetical research project are as follows:

- (a) The Canadian public aged eighteen and over;
 - Including retired Canadians “snowbirds” who plan to vacation in the United States, particularly Florida.
 - Including families with children likely to vacation in Florida.
- (b) Health sector workers, particularly those who would be “front line” personnel in the medical response;
- (c) Police officers who would be called upon to assist in the implementation of containment measures and in the maintenance of public order;
- (d) Military personnel who, in extreme situations, would be called upon to assist with emergency measures;

Table 1 below provides estimates of the numbers of people in each of these segments of the population. Offerors may revise these estimates based on alternate or more detailed sources on information if they so choose.

TABLE 1: POPULATIONS TO BE CONSIDERED

POPULATION		ESTIMATED NUMBER	INFORMATION TAKEN FROM
(a) [2011]	Canadian public aged eighteen and over	26,579,015	Population by sex and age group, 2011 Census of Population, Statistics Canada Catalogue no. 98-311-XCB2011023
[2013]	Canadians spending extended time out of Canada (up to 183 days in a 12 month period)	70,000	Canadian snowbird Association* To be used as a guide, not a complete reference
[2011]	All families with children at home	5,637,135	Families in private households and presence of children, 2011 Census of Population,

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			Statistics Canada Catalogue no.98-312-XCB
(b) [2006]	Health Occupations	950,360	Experienced labour force 15 years and over by occupation , Statistics Canada, 2006 Census of Population
[2014]	Physicians	74,788	Number of Physicians by Province/Territory and Specialty, Canada 2014 , Masterfile, Jan 2014, Canadian Medical Association (CMA)
[2011]	Nurses (registered nurses (RNs), licensed practical nurses (LPNs) and registered psychiatric nurses (RPNs))	270,724	Registered Nursing Workforce, by Jurisdiction, Canada, 2007 to 2011 Canadian Institute for Health Information. Regulated Nurses: Canadian Trends (Table 3)
[2011]	Other health sector workers (Paramedics, Respiratory Therapists, Medical Laboratory Technologists, Environmental Public Health Professionals)	68,339	Final count not complete, as it may include other professions.*To be used as a guide, not a complete reference Health Personnel Database, Canadian Institute for Health Information.
(c) [2013]	Police officers	69,272	Police officers, provinces and territories , Statistics Canada, CANSIM, table 254-0002
(d) [2011]	Military personnel	93,914	Military personnel and pay , Statistics Canada, CANSIM, table 183-0004 & Catalogue no 68-213-XIB

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Cautions: *Numbers in the table above have been assembled from different sources and collection methods vary between sources. The estimate of total health occupations includes those in the age group 15-17. Also note the variations in the years to which the numbers refer. Numbers are provided as an aid in proposing a sampling plan. Offerors may substitute estimates if they believe alternate estimates are more accurate.*

While all of the populations listed are of interest, the research plan proposed may need to make strategic choices in relation to (a) the populations that can be effectively covered within the budget and (b) the type of techniques that are practical given the populations, the ease/difficulty of doing research with them, and the suitability of given techniques to each population. These constraints may lead Offerors to make strategic choices between the populations including possibly the exclusion of one or more populations or inclusion of an audience not identified in Table 1. Offerors should provide a rationale of these choices as part of their proposal for the sample project.

Requirements:

Offerors should assume that they would be required to undertake the following activities as part of the hypothetical sample project:

- Up to 3 meetings (in person or by phone) with the Project Authority as and when requested to discuss design issues, sampling procedures, research schedule and deliverables; Offerors should assume that the client is a senior manager, but not a researcher;
- Provide client liaison in either official language;
- Develop and submit for approval proposed lines of enquiry for survey questionnaires;
- Design and submit the sampling plan for approval;
- Register the survey with the National Survey Registration System;
- Develop all questionnaires, submit them for approval, revise as necessary, translate the final questionnaires in the other official language, pre-test each survey questionnaire in English (10) and in French (10) and provide a brief written analysis (in one language) of pre-test results;
- If telephone interviews are proposed:
 - Program a questionnaire using a computer assisted telephone interviewing (CATI) system; (or otherwise reproducing the questionnaire for interviews);
 - Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, a transfer or call-back must be made within 20 minutes of the initial call. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
 - Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9p.m. in a given time zone;
 - Making a minimum of 8 call backs for landline and 5 for cell-phone only households, where applicable; and
 - Monitor call dispositions/reasons for non-response throughout the field period.
- If online interviews are proposed:
 - Program a questionnaire using a computer assisted web interviewing (CAWI) system; (or otherwise reproducing the questionnaire for an online survey);
 - Organize the fieldwork and administer the questionnaires in the preferred Official Language of the respondent;
 - Prepare and distribute e-mail invitations to potential online respondents;
 - Host the online survey, on a server located in Canada;
 - Provide secure and confidential links to the online survey for respondents;
 - Live review of survey prior to launch, including revision(s);
 - Provision of user ID's / Passwords; and
 - Monitor survey completion rates/reasons for non-response throughout the field period.
- Provide an analysis plan detailing cross tabulation of the data;
- Prepare sample;

-
- List cleaning;
 - Provide respondent support;
 - Ensure effective bilingual quality control measures;
 - Provide progress reports;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada; including fieldwork;
 - Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
 - Provide the Project Authority with weighted partial results during fieldwork
 - Enter results and analyze the resulting data to create tables and coding procedures defined in consultation with the Project Authority;
 - Code the data;
 - Provide complete weighted frequencies immediately following completion of fieldwork
 - Analyze the results of the fieldwork;
 - Submit a report outline to the Project Authority for approval;
 - Prepare a draft report in one language for approval and revise the draft report as necessary;
 - Prepare and deliver a bilingual PowerPoint presentation(s) of key findings;
 - Finalize the report(s) in one official language; the final report(s) should contain the key findings, executive summary, conclusions and recommendations, and a technical report outlining the dates and location(s) of the fieldwork, the recruitment method and details, including a description of the target audience(s), the estimated and actual incidence rate, the number of initial calls, the number of call-backs, the refusal rate, and all other pertinent information about the recruitment or execution of the fieldwork that can be used to replicate the research initiative, if required; the complete set of tables in both official languages should be appended; translation of the final report(s) will be the responsibility of the Project Authority. The written report must include relevant content as per the Public Opinion Research Final Report Checklist (Annex "E");
 - Provide an electronic copy of the final report(s);
 - Provide a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset; and
 - Certify by the Offeror's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

When Offerors are preparing their responses they should keep in mind:

- *Library and Archives of Canada Act* <http://laws-lois.justice.gc.ca/eng/acts/L-7.7/>
- Public Opinion Research Contract Regulations. <http://laws-lois.justice.gc.ca/eng/regulations/SOR-2007-134/page-1.html>
- Communications Policy of the Government of Canada <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12316>
- Procedures for the Management of Public Opinion Research <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=28033>
- The Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys (Annex “G”)
- The Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys (Annex “G”)
- Marketing Research Intelligence Association (MRIA) Code of Conduct and Good Practice <http://mria-arim.ca/sites/default/uploads/files/MRIAConduct-Dec2007REV2010.pdf>
- Public Opinion Research Final Report: Requirements and General Advice (Annex “E”)

Offeror's response to the sample project:

Offerors are required to describe an appropriate methodology based on the research objectives, budget and timeframe identified for the quantitative research plan described above. For the purpose of this exercise the Offeror should consider undertaking a probability sample, where feasible. The research description should include:

1. Understanding of the project requirement; **(5 points)**
2. An explanation of how the quantitative research will serve research objectives; **(10 points)**
3. A description of the methodology including the following details:
 - a. A description of the methods to be used to collect information in each cell, including descriptions of the techniques to be used in each research component, (e.g., outbound telephone survey; mail or e-mail/electronic survey; in-person interview; etc.) and a rationale and justification for the choice of technique for each component; **(15 points)**
 - b. An estimate of the length/duration of the questionnaire(s), for each audience; **(5 points)**
 - c. Offerors should also describe all data collection systems to be used for this project including but not limited to the number of CATI systems used, the expected response rate or rates; **(5 points)**
 - d. A sampling plan showing the number of completions proposed for each of population segments identified in Table 1 above. The sampling plan should show the number of completions proposed for each population segment for each region. Regions are defined in Table 2 below. The Offeror should also provide a discussion on weighting. The Offeror should also provide an estimate of the resulting margins of error for each cell in Table 2, where applicable. Table 2 should be included in the Offer. In developing a sampling plan the Offeror may propose strategic approaches in some population segments in order to achieve cost efficiencies that keep the project within budget; **(20 points)**

TABLE 2: Use to show numbers of completions proposed and margins of error per cell

Table 2							
Target Audience		Atlantic	QC	ON	Prairies	BC,NU, NT	Total
Canadian public aged eighteen and over	Number of survey completions						
	Margin of error						N/A
Retired Canadians	Number of survey completions						
	Margin of error						N/A
Canadian families with children	Number of survey completions						
	Margin of error						N/A
Health sector workers	Number of survey completions						
	Margin of error						N/A
Physicians	Number of survey completions						
	Margin of error						N/A
Nurses (RNs employed in nursing)	Number of survey completions						
	Margin of error						N/A
Other health sector workers	Number of survey completions						
	Margin of error						N/A
Police officers	Number of survey completions						
	Margin of error						N/A
Military personnel	Number of survey completions						
	Margin of error						N/A

4. A rationale for the distribution of the completions in the manner chosen. Where the Offeror is unable to provide coverage of all of the population segments listed as a consequence of budget limitations, the Offeror should provide a rationale for the population segments chosen; **(15 points)**
5. A description of measures planned by the Offeror to undertake research, particularly with the 18-34 youth age group in the case of landline telephone surveys and proposed steps to reduce reliance on weighting required; **(10 points)**
6. An explanation of how completions will be obtained (for example, by sampling/screening within the general population, via the use of specific lists, or pre-qualified samples such as panels, or any other sampling method.) Where the methodology used is screening within the general population, Offerors should provide estimates of the numbers of attempts that they anticipate will be required to achieve the number of completions proposed. In their costing proposal for the sample project, Offerors should demonstrate that screening costs have been adequately budgeted; **(15 points)**
7. The merits and challenges associated with including or excluding a sample of cell-phone households; **(10 points)**
8. A list of the topics proposed for each separate research instrument. To support the line of questioning a sample of questions for each topic must also be provided; **(20 points)**
9. A description of the analysis proposed along with a description of the benefits of this type of analysis and any limitations; **(10 points)**

-
10. A description of how respondents who prefer to be responded to in the other official language will be handled; particularly completing French interviews outside of Quebec, and English interviews within Quebec; **(10 points)**
 11. A description of how to deal with high refusal rates; and procedures employed to deal with respondents whose first language is neither English nor French; **(10 points)**.
 12. Steps proposed to minimize item non-response, in particular demographic questions on income and age; **(10 points)**
 13. All quality control measures taken by the Offeror to ensure the accuracy of their data collection and verification procedures including:
 - a. data input as well as data validity and integrity checks; and **(5 points)**
 - b. editing and coding procedures including methods used to assure inter-coder reliability. **(5 points)**
 14. A description of reporting requirements to be met, including all items to be contained on the cover page, in the executive summaries, the main points of the final report, and items to be included in the appendices. See Annex "E"; and **(5 points)**
 15. A detailed timetable and breakdown of costs for the quantitative research consistent with the timeframe, budget, and proposed pricing grids submitted in accordance to Annex "B5" – Series D (Quantitative Research). **(5 points)**

RD.5 Environmental Attributes (Minimum N/A – Maximum 10 points)

The Offeror should provide their existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); and their existing or proposed action plan for materials/equipment sourcing (e.g., intended use of recycled or reused products, waste management strategy, etc.).

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4.3 FINANCIAL EVALUATION – SERIES D

A. HOURLY RATES FOR SERVICES

WEIGHTING

1. Senior Researcher	4%
2. Client Liaison	2%
3. Programmer	1%
4. Translator	1%
5. Sample Manager	1%
6. Coder (open-ended)	1%

B. RATES FOR INTERVIEWS (FIRM ALL INCLUSIVE LOT PRICE)

7. Rates for Landline Telephone Interviewing, inclusive of Data Tabulation	20%
8. Rates for Incident Rate: Based on an Incident Rate of 90% or less	15%
9. Rates for Cell Phone Only Completions - Youth Aged 18 to 34	15%
10. Rates for Cell Phone Only Completions - General Population	10%
11. Rates for Online Panel Completions, inclusive of Data Tabulation	15%
12. Rates for Other Online Completions and Data Tabulation	15%

TOTAL 100%

The following tables are an example of how the total evaluated price, and the weighted pricing score will be calculated from the rates provided in the basis of payment.

Rates used in this example are for demonstration purposes only, and are not intended to reflect any expectations on behalf of the Government of Canada.

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Step 1

Calculate the average value of all cells for the applicable tables of the basis of payment. Below is one table, for the purpose of this example.

TABLE B5.2.1 Fixed unit price for individual landline telephone completions with the adult general public, inclusive of data tabulation

Rates for the Initial Period of Standing Offer							
Questionnaire duration in minutes	1 - 499	500 - 999	1000 - 1499	1500 - 1999	2000 - 2499	2500 - 3000	Average value for each row
5 minutes	20	30	30	30	30	40	\$30.00
6 minutes	25	27.5	30	30	32.5	35	\$30.00
7 minutes	35	35	35	35	35	35	\$35.00
8 minutes	35	35	35	35	35	35	\$35.00
9 minutes	35	35	35	40	40	40	\$37.50
10 minutes	38	39	40	40	41	42	\$40.00
11 minutes	37	38	39	41	42	43	\$40.00
12 minutes	40	40	40	45	45	45	\$42.50
13 minutes	35	40	42.5	47.5	50	55	\$45.00
14 minutes	45	45	45	45	45	45	\$45.00
15 minutes	45	47	49	51	53	55	\$50.00
20 minutes	50	50	50	50	50	50	\$50.00
Average value of all cells							\$40.00

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Step 2**A.1 HOURLY RATE CATEGORIES FOR THE INITIAL PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$70.00	4%	\$2.80
Client Liaison	\$50.00	2%	\$1.00
Programmer	\$50.00	1%	\$0.50
Translator	\$50.00	1%	\$0.50
Sample Manager	\$50.00	1%	\$0.50
Coder (open-ended)	\$50.00	1%	\$0.50
TOTAL (A)			\$5.80

B.1 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE INITIAL PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing, inclusive of Data Tabulation (Average value of all cells)	\$40.00	20%	\$8.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$40.00	10%	\$4.00
Rates for Online Panel Completions, inclusive of Data Tabulation (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Other Online Completions and Data Tabulation (Average value of all cells)	\$40.00	15%	\$6.00
TOTAL (A)			\$36.00
TOTAL (A+B)			\$41.80

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Step 3**A.2 HOURLY RATE CATEGORIES FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$70.00	4%	\$2.80
Client Liaison	\$50.00	2%	\$1.00
Programmer	\$50.00	1%	\$0.50
Translator	\$50.00	1%	\$0.50
Sample Manager	\$50.00	1%	\$0.50
Coder (open-ended)	\$50.00	1%	\$0.50
TOTAL (A)			\$5.80

B.2 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE FIRST OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing, inclusive of Data Tabulation (Average value of all cells)	\$40.00	20%	\$8.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$40.00	10%	\$4.00
Rates for Online Panel Completions, inclusive of Data Tabulation (Average value of all cells)	\$40.00	15%	\$6.00
Rates for Other Online Completions and Data Tabulation (Average value of all cells)	\$40.00	15%	\$6.00
TOTAL (A)			\$36.00
TOTAL (A+B)			\$41.80

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Step 4**A.3 HOURLY RATE CATEGORIES FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$75.00	4%	\$3.00
Client Liaison	\$55.00	2%	\$1.10
Programmer	\$55.00	1%	\$0.55
Translator	\$55.00	1%	\$0.55
Sample Manager	\$55.00	1%	\$0.55
Coder (open-ended)	\$55.00	1%	\$0.55
TOTAL (A)			\$6.30

B.3 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE SECOND OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing, inclusive of Data Tabulation (Average value of all cells)	\$45.00	20%	\$9.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$45.00	15%	\$6.75
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$45.00	15%	\$6.75
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$45.00	10%	\$4.50
Rates for Online Panel Completions, inclusive of Data Tabulation (Average value of all cells)	\$45.00	15%	\$6.75
Rates for Other Online Completions and Data Tabulation (Average value of all cells)	\$45.00	15%	\$6.75
TOTAL (A)			\$40.50
TOTAL (A+B)			\$46.80

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Step 5**A.4 HOURLY RATE CATEGORIES FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER**

Category of Service	Hourly Rates	Weighting Factor	Weighted Rate
Senior Researcher	\$80.00	4%	\$3.20
Client Liaison	\$60.00	2%	\$1.20
Programmer	\$60.00	1%	\$0.60
Translator	\$60.00	1%	\$0.60
Sample Manager	\$60.00	1%	\$0.60
Coder (open-ended)	\$60.00	1%	\$0.60
TOTAL (A)			\$6.80

B.4 RATES FOR TELEPHONE INTERVIEW COMPLETIONS FOR THE THIRD OPTION PERIOD OF THE STANDING OFFER

Rates for Interview Completions	Average	Weighting Factor	Weighting Rate
Rates for Landline Telephone Interviewing, inclusive of Data Tabulation (Average value of all cells)	\$50.00	20%	\$10.00
Rates for Incident Rate: Based on an Incident Rate of 90% or less (Average value of all cells)	\$50.00	15%	\$7.50
Rates for Cell Phone Only Completions - Youth Aged 18 to 34 (Average value of all cells)	\$50.00	15%	\$7.50
Rates for Cell Phone Only Completions - General Population (Average value of all cells)	\$50.00	10%	\$5.00
Rates for Online Panel Completions, inclusive of Data Tabulation (Average value of all cells)	\$50.00	15%	\$7.50
Rates for Other Online Completions and Data Tabulation (Average value of all cells)	\$50.00	15%	\$7.50
TOTAL (A)			\$45.00
TOTAL (A+B)			\$51.80

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Step 6

PERIODS	TOTAL (A+B)
Initial Period of the Standing Offer (\$41.80 x 3)	\$125.40*
First Option Period of the Standing Offer	\$41.80
Second Option Period of the Standing Offer	\$46.80
Third Option Period of the Standing Offer	\$51.80
TOTAL EVALUATED PRICE	\$265.80

*= Please note that the Total (A+B) for the Initial period of the Standing Offer will be multiplied by 3 for the purpose of the financial evaluation.

Step 7- To establish the pricing score, each responsive offer will be prorated against the lowest evaluated price and the ratio of 20%.

$$\frac{\text{Lowest Responsive Evaluated Price}}{\text{Offeror's Evaluated Price}}$$

X 20 % = Weighted Pricing Score

OFFERORS	TOTAL EVALUATED PRICE	WEIGHTED PRICING SCORE
OFFEROR A	\$265.80	17.50
OFFEROR B	\$262.97	17.69
OFFEROR C	\$257.91	18.04
OFFEROR D	\$283.20	16.43
OFFEROR E	\$280.16	16.61
OFFEROR F	\$313.54	14.84
OFFEROR G	\$333.77	13.94
OFFEROR H	\$318.60	14.60
OFFEROR I	\$303.42	15.33
OFFEROR J	\$232.63	20.00
OFFEROR K	\$354.00	13.14
OFFEROR L	\$429.85	10.82
OFFEROR M	\$379.28	12.27
OFFEROR N	\$404.57	11.50
OFFEROR O	\$348.94	13.33

4.4 TECHNICAL MERIT SCORE

The example demonstrates how the technical merit score will be calculated.

To establish the technical merit score, the overall technical score for each responsive offer will be determined as follows:

$$\frac{\text{Total number of points obtained}}{\text{Maximum number of points available}} \times 80 \% = \text{Weighted Technical Score}$$

Scores used in this example are for demonstration purposes only.

OFFERORS	TOTAL NUMBER OF POINTS OBTAINED (OUT OF 800 points)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)
OFFEROR A	710	71
OFFEROR B	730	73
OFFEROR C	705	70.5
OFFEROR D	750	75
OFFEROR E	790	79
OFFEROR F	700	70
OFFEROR G	780	78
OFFEROR H	700	70
OFFEROR I	690	69
OFFEROR J	640	64
OFFEROR K	780	78
OFFEROR L	670	67
OFFEROR M	725	72.5
OFFEROR N	770	77
OFFEROR O	745	74.5

4.5 COMBINED RATING

The example demonstrates how the final combined rating will be calculated.

The technical merit score and the pricing score will be added to determine its combined rating.

Scores used in this example are for demonstration purposes only.

OFFERORS	WEIGHTED FINANCIAL SCORE (OUT OF 20 POINTS)	WEIGHTED TECHNICAL SCORE (OUT OF 80 POINTS)	COMBINED RATING (OUT OF 100 POINTS)	RANKING OF COMBINED RATING
OFFEROR A	17.50	71	88.50	7
OFFEROR B	17.69	73	90.69	5
OFFEROR C	18.04	70.5	88.54	6
OFFEROR D	16.43	75	91.43	3
OFFEROR E	16.61	79	95.61	1
OFFEROR F	14.84	70	84.84	10
OFFEROR G	13.94	78	91.94	2
OFFEROR H	14.60	70	84.60	12
OFFEROR I	15.33	69	84.33	13
OFFEROR J	20.00	64	84.00	14
OFFEROR K	13.14	78	91.14	4
OFFEROR L	10.82	67	77.82	15
OFFEROR M	12.27	72.5	84.77	11
OFFEROR N	11.50	77	88.50	8
OFFEROR O	13.33	74.5	87.83	9

Neither the responsive offer obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. For each Series, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price will be recommended for award of a Standing Offer for each Series.

In the example above, Offerors A, B, C, D, E, F, G, K, N, and O would be recommended for issuance of a Standing Offer. Offerors H, I, J, L, and M would not be recommended for issuance of a Standing Offer.

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5. TECHNICAL EVALUATION – SERIES E (QUALITATIVE AND QUANTITATIVE RESEARCH)

SERIES E: QUALITATIVE AND QUANTITATIVE RESEARCH

5.1 MANDATORY TECHNICAL CRITERIA – SERIES E

In order to be considered for Series E - Qualitative and Quantitative Research, the Offeror must be responsive in both Series C and Series D.

5.2 POINT RATED TECHNICAL CRITERIA – SERIES E

In order to be considered for Series E - Qualitative and Quantitative Research, the Offeror must be responsive in both Series C and Series D.

5.2.1 SELECTION METHOD FOR THE ISSUANCE OF STANDING OFFERS FOR SERIES E

The following table is an example of how the Combined Rating for Series E will be calculated from the combined rating from Series C and Series D.

Ratings used in this example are for demonstration purposes only.

For Series E, the ten (10) responsive offer(s) with the highest combined rating of technical merit and price from both Series C and Series D will be recommended for award of a Standing Offer for Series E.

OFFERORS	COMBINED RATING FOR SERIES C (OUT OF 100 POINTS)	COMBINED RATING FOR SERIES D (OUT OF 100 POINTS)	COMBINED RATING FOR C AND D SERIES (OUT OF 200 POINTS)	RANKING OF COMBINED RATING FOR SERIES E
OFFEROR A	90.22	88.50	178.72	2
OFFEROR B	87.90	90.69	178.59	3
OFFEROR C	88.05	88.54	176.59	8
OFFEROR D	86.64	91.43	178.07	5
OFFEROR E	81.44	95.61	177.05	6
OFFEROR F	82.66	84.84	167.50	15
OFFEROR G	77.64	91.94	169.58	13
OFFEROR H	91.29	84.60	175.89	9
OFFEROR I	83.42	84.33	167.75	14
OFFEROR J	87.02	84.00	171.02	11
OFFEROR K	87.28	91.14	178.42	4
OFFEROR L	92.75	77.82	170.57	12
OFFEROR M	86.34	84.77	171.11	10
OFFEROR N	97.00	88.50	185.50	1
OFFEROR O	89.21	87.83	177.04	7

As a result of the highest combined rating of technical and price for Series C and Series D, Offerors A, B, C, D, E, H, K, M, N, and O would be recommended for issuance of a Standing Offer under Series E.

Offerors F, G, I, J, and L would not be recommended for issuance of a Standing Offer under Series E.

ANNEX "D"
ACTS, POLICIES AND STANDARDS APPLICABLE TO THE CONDUCT
OF PUBLIC OPINION RESEARCH FOR THE GOVERNMENT OF CANADA

D.1 A FOCUS ON RESEARCH AND QUALITY AND VALUE FOR MONEY

Standards for the Conduct of Government of Canada Public Opinion Research – Telephone and On-line Surveys

In recent years, the Auditor General of Canada, Government of Canada departments, and Public Works and Government Services Canada (PWGSC) have raised various concerns over telephone and online survey quality issues. Consequently, the Public Opinion Research Directorate (PORD) has led the development of both telephone and online survey quality standards.

The Offeror must be prepared to meet or exceed the Government of Canada standards contained in Annex "G" of this document. Where those standards do not cover particular issues, Offerors will be required to meet or exceed the standards of the Marketing Research and Intelligence Association (MRIA). More information on the MRIA's research standards can be found at: <http://mria-arim.ca/>.

In the absence of Government of Canada standards for qualitative research, the research must meet or exceed the qualitative standards of the MRIA. Further, all research must also meet or exceed consent and privacy requirements of the *Personal Information Protection and Electronic Documents Act*.

In all cases, Government of Canada public opinion research standards take precedence over any other standards. These standards can be found in Annex "G" of this document.

It is anticipated that additional Government of Canada quality standards (both qualitative and quantitative) will be developed over the course of the period of resulting Standing Offers, and Offerors will be asked at that time to accept these additional terms of the Standing Offer.

Information on the Government of Canada's POR activities, contracts and reports can be found at: <http://www.tpsgc-pwgsc.gc.ca/rop-por/index-eng.html>

D.2 GOVERNMENT OF CANADA ACTS AND POLICIES RELATED TO PUBLIC OPINION RESEARCH

Offerors are encouraged to consult the *Communications Policy of the Government of Canada* which can be found at:

<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316§ion=text#sec5.8>

In addition to the Communications Policy of the Government of Canada, the following Acts and policies, among others, are relevant to the conduct of POR for the Government of Canada:

- Access to Information Policy
- Web Standards for the Government of Canada
- Common Services Policy
- Contracting Policy

- Management of Government Information Policy
- *Official Languages Act and Policy Framework*
- *Personal Information Protection and Electronic Documents Act (PIPEDA)*
- Procedures for the Management of Public Opinion Research
- *Privacy Act*
- *Financial Administration Act*
- *Library and Archives of Canada Act*

D.3 WEB STANDARDS FOR THE GOVERNMENT OF CANADA

The Treasury Board of Canada Secretariat has developed Web standards and demonstrates the Government of Canada's commitment to delivering websites and applications that are more accessible, usable, interoperable and optimized for mobile devices. These Web Standards replace Common Look and Feel 2.0 (CLF 2.0) Standards for the Internet

<http://www.tbs-sct.gc.ca/ws-nw/index-eng.asp>

D.4 A RESPECT FOR PRIVACY

As stipulated in the Communications Policy of the Government of Canada, Offerors must ensure that the principles of fair information practices embodied in Sections 4 to 8 of the *Privacy Act*, as well as in the *Personal Information Protection and Electronic Documents Act*, are respected in any POR, including respondents' explicit (not implicit) consent to be interviewed if lists are involved. Offerors conducting research on behalf of the Government of Canada must disclose to research participants: the purpose of the research; the sponsoring department / agency or the Government of Canada as a whole and the research supplier; that their participation is voluntary and in most cases anonymous, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation.

D.5 SUBMISSION OF PUBLIC OPINION RESEARCH REPORTS TO LIBRARY AND ARCHIVES CANADA

The *Library and Archives of Canada Act* states:

15.1 Every department, as defined in section 2 of the *Financial Administration Act*, shall, within six months after the completion of any data collection done for the purposes of public opinion research carried out under a contract at the request of the department and for the exclusive use of Her Majesty the Queen in right of Canada, send to the Librarian and Archivist the written report referred to in subsection 40(2) of the *Financial Administration Act*.

The *Financial Administration Act* states:

40(2) It is a term of every contract for public opinion research entered into by any person with Her Majesty that a written report will be provided by that person.

It is a legal requirement for institutions to send written public opinion research reports to Library and Archives Canada within six months of the completion of the data collection.

Please refer to Annex "E" for all reporting requirements to be included in each final public opinion research report.

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ANNEX "E"
PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST

Public Opinion Research Final Report Checklist

<http://www.tpsgc-pwgsc.gc.ca/rop-por/lvfp-or-porfrc-eng.html>

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ANNEX "F"
POLITICAL NEUTRALITY CERTIFICATION

This certification is to be submitted with the final report submitted to the Project Authority.

I hereby certify as a Representative of _____ that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed _____

Date _____

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ANNEX "G"
**STANDARDS FOR THE CONDUCT OF GOVERNMENT OF CANADA PUBLIC OPINION
RESEARCH**

The Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys. <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>

The Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys. <http://www.tpsgc-pwgsc.gc.ca/rop-por/enligne-online-eng.html>

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ANNEX "H" ADVERTISING CAMPAIGN EVALUATION TOOL (ACET)

PLEASE CONSULT THE INSTRUCTIONS FOR USE.

INTRODUCTION

Please use the elements outlined in the Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys, under Section 2.1.2: <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>

Note that the Government of Canada should not be identified in the introduction.

- a) May I please speak with the person in your household who is 18 years of age or older and who has had the most recent birthday? Would that be you? **[IF THAT PERSON IS NOT AVAILABLE ARRANGE CALLBACK]**

Yes	=> CONTINUE
No	=> ASK TO SPEAK TO 'ELIGIBLE' PERSON AND START AGAIN
REFUSED	=> THANK AND TERMINATE

- b) Would you be willing to take part in this survey? We can do it now or at a time more convenient for you.

Yes, now	=> CONTINUE
Yes, call later	=> ENTER CALLBACK DATE AND TIME
REFUSED	=> THANK AND TERMINATE

[IF ASKED] The survey will take about XX minutes to complete.

CORE QUESTIONS

ASK ALL RESPONDENTS

Q1A:

Over the past few weeks or so, have you seen, heard or read any advertising about [INSERT CAMPAIGN TOPIC AREA]? **[STATE TOPIC IN TWO OR THREE WORDS BUT DO NOT DESCRIBE CAMPAIGN THEME]**

Yes	
No	=> GO TO Q2
DON'T KNOW	=> GO TO Q2
REFUSED	=> GO TO Q2

Q1B:

What can you remember about this advertising? What words, sounds or images come to mind? **[ACCEPT MULTIPLE RESPONSES]**

INSERT RESPONSE
DON'T KNOW
REFUSED

Q2: RANDOMIZE MEDIA CHANNELS. REPEAT Q2 FOR EACH MEDIA COMPONENT OF CAMPAIGN [I.E. 2A, 2B, 2C...]. REVISE AD DESCRIPTION AS NEEDED.

Do you remember seeing or hearing a [INSERT MEDIA CHANNEL] ad over the past few weeks or so **[DESCRIBE AD IN NO MORE THAN TWO SENTENCES]**?

Yes	
No	
DON'T KNOW	
REFUSED	
VOLUNTEERED: Not applicable/do not have/use medium (e.g. Internet).	

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IF RESPONDENT RECALLS ANY OF THE ADS IN Q2 SERIES OF QUESTIONS, CONTINUE; OTHERWISE SKIP TO D1.

Q3:

Thinking about the advertising that you saw/heard, what do you think was the main point this advertising was trying to get across? **[OPEN-ENDED, ACCEPT ONE RESPONSE]**

INSERT RESPONSE
DON'T KNOW
REFUSED

REVISED Q5A:

Q5A:

With regard to the ads you have seen or heard, in your opinion, who produced them? In other words, who funded them?

[DO NOT READ LIST, ACCEPT ONE RESPONSE]

Government of Canada / Federal Government
Provincial Government
Municipal Government
Government (General)
Taxpayers
Other (Specify) _____
DON'T KNOW
REFUSED

Q5B:

[ASK Q5B IF Q5A = 'Government (General) OTHERWISE GO TO D1]

Which level of government? **[READ LIST, ACCEPT ONE RESPONSE]**

Federal government
Provincial government
Municipal government
Other
DON'T KNOW
REFUSED

END OF CORE QUESTIONS [EXCLUDING DEMOGRAPHIC QUESTIONS]

CAMPAIGN-SPECIFIC QUESTIONS MAY BE ADDED HERE

CORE DEMOGRAPHIC QUESTIONS

Finally, I'd like to ask you some questions for statistical purposes. I'd like to remind you that all your answers are completely confidential.

D1:

Which of the following categories best describes your current employment status? Are you...? **[READ LIST, ACCEPT ONE RESPONSE]**

Working full-time (35 or more hours per week)
Working part-time (less than 35 hours per week)
Self-employed
Student attending full time school (not working)
Unemployed, but looking for work

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Not in the workforce (e.g. unemployed, but not looking for work, a full-time homemaker or parent)

Retired

Other

REFUSED

D2:

What is the highest level of formal education that you have completed to date? **[READ LIST, ACCEPT ONE RESPONSE]**

Elementary school or less

Secondary school

Some post-secondary

College, vocational or trade school

Undergraduate university program

Graduate or professional university program

REFUSED

D3:

In what year were you born?

RECORD YEAR: _____

REFUSED

D4:

Are there any children under the age of 18 currently living in your household?

Yes

No

REFUSED

D5:

Which of the following categories best describes your total household income? That is, the total income of all persons in your household, before taxes? **[READ LIST, ACCEPT ONE RESPONSE]**

Under \$20,000

\$20,000 to just under \$40,000

\$40,000 to just under \$60,000

\$60,000 to just under \$80,000

\$80,000 to just under \$100,000

\$100,000 to just under \$120,000

\$120,000 to just under \$150,000

\$150,000 and above

REFUSED

D6:

What is the language you first learned at home as a child and still understand? **[DO NOT READ LIST, ACCEPT UP TO TWO RESPONSES]**

English

French

Other (Specify) _____

REFUSED

D7 :

In the last two weeks, have you...

RANDOMIZE MEDIA CHANNELS

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- a. Read a daily newspaper?
- b. Read a weekly community newspaper?
- c. Watched television?
- d. Listened to the radio?
- e. Used public transit?
- f. Read a magazine?
- g. Used the Internet?
- h. **(SI LE RÉPONDANT UTILISE INTERNET)** Used Facebook?
- i. **(SI LE RÉPONDANT UTILISE INTERNET)** Watched videos on Youtube?
- j. Watched a movie at a movie theatre? Etc...

Yes
No
DON'T KNOW
REFUSED

END OF CORE DEMOGRAPHIC QUESTIONS

INSERT ADDITIONAL OPTIONAL DEMOGRAPHIC QUESTIONS HERE, AS REQUIRED.

POSSIBLE ADDITIONAL SOCIO-DEMOGRAPHIC QUESTIONS (AS REQUIRED)

To which ethnic or cultural group or groups do you belong? **[DO NOT READ LIST, ACCEPT UP TO TWO RESPONSES]**

Canadian (e.g. Québécois/Québécoise)
North or Central American - Outside Canada (e.g. American, Cuban, Haitian, Mexican, Guatemalan)
Aboriginal (e.g. Métis, First Nation, Inuit)
Arab
African (e.g. Algerian, Ethiopian, Egyptian, Moroccan)
Australian or New Zealand
Asian (e.g. Lebanese, Iranian, Indian, Chinese)
Black
European (e.g. English, French, German, Italian, Russian, Turkish)
Jewish
South American (e.g. Columbian, Brazilian, Chilean)
Other (Specify) _____
REFUSED

Are you worried about losing your job or being laid off in the next six months?

Yes
No
REFUSED

Were you born in Canada?

Yes
No
REFUSED

=> SKIP NEXT TWO QUESTIONS

Did you come to Canada as a child, as a teenager or as an adult?

Child
Teenager
Adult
REFUSED

Are you a Canadian citizen?

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Yes
No
REFUSED

END OF ADDITIONAL DEMOGRAPHIC QUESTIONS

INSERT QUESTIONS ON MEDIA CONSUMPTION, AS REQUIRED.

That concludes the survey. This survey was conducted on behalf of [INSERT DEPARTMENT/AGENCY]. In the coming months the report will be available from Library and Archives Canada. We thank you very much for taking the time to participate, it is greatly appreciated.

INTERVIEWER RECORDS:

- **INSERT GENDER**
- **INSERT LANGUAGE OF INTERVIEW**
- **INSERT DATE OF THE INTERVIEW**
- **INSERT PROVINCE/TERRITORY**

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APPENDIX "1"
OFFER'S SUBMISSION – SERIES

INSTRUCTIONS:

Identifying a Series:

Offerors must clearly indicate the Series for which they wish to be considered.

OFFEROR'S CHOICE:

_____ : **Series A – Fieldwork and Data Tabulation for Online Surveys**

_____ : **Series B – Fieldwork and Data Tabulation for Telephone Surveys**

_____ : **Series C – Qualitative Research**

_____ : **Series D – Quantitative Research**

NOTE:

If your offer is responsive in both Series C and Series D, your firm will be considered for Series E – Qualitative and Quantitative Research.

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APPENDIX "2"
CONSENT TO SUBMISSION OF RÉSUMÉ

NOTE:

Appendix "2" is to be completed and submitted only if requested by the Standing Offer Authority.

I _____ (name of proposed personnel), certify that I consent to my résumé being submitted on behalf of _____ (name of firm) in response to the Request for Standing Offers (RFSO) for Public Opinion Research Services EP363-140002/B and subsequent call-ups.

Signature of Proposed Personnel

Date

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APPENDIX "3"
CONSENT TO PUBLIC OPINION RESEARCH (POR) REPORTS

I _____ (name of proposed personnel), certify that I consent to the public deposit of all Public Opinion Research reports being submitted on behalf of _____ (name of firm) in response to the Request for Standing Offers (RFSO) for Public Opinion Research Services - EP363-140002/B.

Signature of Proposed Personnel

Date

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APPENDIX "4" QUALIFICATIONS TEMPLATE

Name of the proposed person: _____

- 1) Academic Qualifications
 - a. Title of Qualification (Type of degree / diploma / certificate etc.)
 - b. Year Obtained
 - c. Institution from which it was obtained
 - d. Specialization(s)

- 2) Other Qualifications

- 3) Training (e.g., Courses / programs etc.)

- 4) Certifications

- 5) Publications

- 6) Awards

- 7) Memberships

- 8) Work Experience
 - a. Total number of years of public opinion research experience by:
 - i. Year(s)
 - ii. Organization
 - iii. Role
 - iv. Brief description of how the work relates to public opinion research