

**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving
PWGSC
33 City Centre Drive
Suite 480C
Mississauga
Ontario
L5B 2N5
Bid Fax: (905) 615-2095**

**Request For a Standing Offer
Demande d'offre à commandes**

National Individual Standing Offer (NISO)
Offre à commandes individuelle nationale (OCIN)

Canada, as represented by the Minister of Public Works and Government Services Canada, hereby requests a Standing Offer on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et Services Gouvernementaux Canada, autorise par la présente, une offre à commandes au nom des utilisateurs identifiés énumérés ci-après.

Comments - Commentaires

**Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution
Public Works and Government Services Canada
Ontario Region
33 City Centre Drive
Suite 480
Mississauga
Ontario
L5B 2N5

Title - Sujet Taxonomic Analysis	
Solicitation No. - N° de l'invitation KW405-131679/A	Date 2015-06-28
Client Reference No. - N° de référence du client KW405-131679	GETS Ref. No. - N° de réf. de SEAG PW-\$TOR-003-6884
File No. - N° de dossier TOR-5-38025 (003)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2015-08-10	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Escander, Lisa	Buyer Id - Id de l'acheteur tor003
Telephone No. - N° de téléphone (905)615-2062 ()	FAX No. - N° de FAX (905)615-2060
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF THE ENVIRONMENT 867 Lakeshore Road Burlington Ontario L7R4A6 Canada	
Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

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

Solicitation No. - N° de l'invitation

KW405-131679/A

Amd. No. - N° de la modif.

File No. - N° du dossier

TOR-5-38025

Buyer ID - Id de l'acheteur

tor003

CCC No./N° CCC - FMS No/ N° VME

KW405-131679

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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into six parts plus attachments and annexes, 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 containing the 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 include the Statement of Work, the Basis of Payment and any other annexes.

1.2 Summary

- i. The objective of the Work is to provide Environment Canada with the capacity to obtain consistent high quality data on the structure, abundance and ecophysiology of the lower foodweb from a range of surface waters. This will contribute to the Federal capacity to respond to and address the general degradation of our inland waters across Canada, and in particular, the following issues: i) Nutrient Management, ii) Harmful Algal Blooms, iii) Invasive Species, iv) Northern Development and v) Climate Change.
- ii. The period of the standing offer will be for a one year period from date of Standing Offer issuance; estimated date :September, 1, 2015 to August 31, 2016;
- iii. As per the Integrity Provisions under section 01 of Standard Instructions [2006](#) and [2007](#) offerors must provide a list of all owners and/or Directors and other associated information as required. Refer to section [4.21](#) of the Supply Manual for additional information on the Integrity Provisions.
- iv. For services requirements, offerors must provide the required information as detailed in article 2.3 of Part 2 of the Request for Standing Offers (RFSO), in order to comply with Treasury Board policies and directives on contracts awarded to former public servants.
- v. The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), and the Agreement on Internal Trade (AIT).

1.3 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>) 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: 60 days
Insert: 120 days

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 on page 1 of the Request for Standing Offers.

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

2.3 Basis for Canada's Ownership of Intellectual Property

Environment Canada 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.

2.4 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 awarded to FPS, bidders must provide the information required below before the issuance of a contract. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

2.4.1 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 [Defense 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.

2.4.2 Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? YES () NO ()

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

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

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

2.4.3 Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

2.5 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 question(s) or may request that offerors do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all offerors. Enquiries not submitted in a form that can be distributed to all offerors may not be answered by Canada.

2.6 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 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.

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 4 hard copies

Section II: Financial Offer 1 hard copy

Section III: Certifications 1 hard 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.

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.

3.1.1 Payment by Credit Card

Canada requests that offerors complete one of the following:

- (a) Government of Canada Acquisition Cards (credit cards) will be accepted for payment of call-ups against the standing offer.

The following credit card(s) are accepted:

VISA _____

Master Card _____

- (b) Government of Canada Acquisition Cards (credit cards) will not be accepted for payment of call-ups against the standing offer.

The Offeror is not obligated to accept payment by credit card.

Acceptance of credit cards for payment of call-ups will not be considered as an evaluation criterion.

3.1.2 Exchange Rate Fluctuation

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation

Section III: Certifications

Offerors must submit the certifications required under Part 5.

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 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 included in Annex "D".

4.1.2 Financial Evaluation

The Offeror must submit pricing, with the offer, in accordance with Annex B, Basis of Payment in Canadian funds. Prices must be submitted for each line item for the initial Standing Offer period and all optional periods, the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.

Offers will be evaluated based on the prices detailed in Annex B – Basis of Payment. The prices detailed in Annex B - Basis of Payment will be input into Annex H – Financial Evaluation for price evaluation purposes.

The price used in the evaluation will be the Total Evaluated Cost which is calculated as follows:

The Extended Price is the firm unit price multiplied by the estimated quantity.

The Total Estimated Price is the sum of the Extended Prices.

Total Evaluated Cost is the sum of the Total Estimated Prices for the initial Standing Offer period and all optional periods.

4.2 Basis of Selection - Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum points specified for each criterion; and
 - d. obtain the required minimum of 97.5 points overall for the technical evaluation criteria which are subject to point rating.
The rating is performed on a scale of 1000 points.
2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		55,000	50,000	45,000
Calculations	Technical Merit Score	115/135 x 60 = 51.11	89/135 x 60 = 39.56	92/135 x 60 = 40.89
	Pricing Score	45/55 x 40 = 32.73	45/50 x 40 = 36.00	45/45 x 40 = 40.00
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

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 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 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.

5.1.2 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" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Employment and Social Development Canada-Labour's](http://www.labour.gc.ca/eng/standards_equity/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" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

5.1.3 Additional Certifications Precedent to Issuance of a Standing Offer

5.1.3.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting 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 Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder 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 Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

5.1.3.2 Education and Experience

SACC Manual clause [A3010T](#) (2010-08-16) Education and Experience

PART 6 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

6.1 Offer

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

6.2 Security Requirements

6.2.1 There is no security requirement applicable to this Standing Offer.

6.3 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>) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

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

6.3.2 Standing Offers Reporting

The Offeror must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Standing Offer. This data must include all purchases, including those paid for by a Government of Canada Acquisition Card.

The Offeror must provide this data in accordance with the reporting requirements detailed in Annex "C". If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Offeror must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Standing Offer Authority.

The reporting periods are defined as follows:

- 1st period: April 1 to June 30;
- 2nd period: July 1 to September 31
- 3rd period: October 1 to December 31
- 4th period: January 1 to March 31

The data must be submitted to the Standing Offer Authority no later than ten (10) calendar days after the end of the reporting period.

6.4 Term of Standing Offer

6.4.1 Period of the Standing Offer

The period for making call-ups against the Standing Offer is from: one year from date of Standing Offer issuance; estimated date: September, 1, 2015 to August 31, 2016.

6.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for an additional four (4), one year periods, from September 1 to August 31 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

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 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.

6.5 Authorities

6.5.1 Standing Offer Authority

The Standing Offer Authority is:

Lisa Escander
Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
33 City Centre Drive, Suite 480C
Mississauga, Ontario
L5B 2N5

Telephone: 902-615-2062
Facsimile: 905-615-2060

Solicitation No. - N° de l'invitation
KW405-131679/A
Client Ref. No. - N° de réf. du client
KW405-131679

Amd. No. - N° de la modif.
File No. - N° du dossier
TOR-5-38025

Buyer ID - Id de l'acheteur
tor003
CCC No./N° CCC - FMS No./N° VME

E-mail address: Lisa.Escander@pwgsc-tpsgc.gc.ca

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, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

6.5.2 Project Authority *(to be inserted at standing offer issuance)*

The Project Authority for the Standing Offer is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____ - ____ - _____
Facsimile: ____ - ____ - _____
E-mail address: _____

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up under the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

6.5.3 Offeror's Representative *(to be completed by offeror)*

Name: _____
Title: _____
Telephone: ____ - ____ - _____
Facsimile: ____ - ____ - _____
E-mail address: _____

6.6 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.

6.7 Identified Users

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

6.8 Call-up Procedures

The Identified User authorized must create a Call-up against the Standing Offer using form PWGSC-TPSGC 942 for the required services.

The Identified User must fax or email the PWGSC-TPSGC 942 to the Standing Offer holder.

The Offeror must acknowledge receipt of the call-up within twenty-four (24) hours of receiving the call-up.

6.9 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using form PWGSC-TPSGC 942, Call-up against a Standing Offer.

6.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed \$100,000.00 (Applicable Taxes included).

6.11 Financial Limitation

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of \$ *(to be inserted at Standing Offer issuance)* (Applicable Taxes excluded) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or four (4) months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

6.12 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the 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 [4007](#) (2010-08-16), Canada to Own Intellectual Property Rights in Foreground Information;
- 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) Annex C, Quarterly Reporting Form
- i) Annex D, Technical Evaluation Criteria;
- j) Annex E, Sample Curriculum Vitae;
- k) Annex F, Completed Sample Technical Evaluation Grid;
- l) Annex G, Mandatory Evaluation Grid;
- m) Annex H, Financial Evaluation;
- n) the Offeror's offer dated _____ *(to be inserted at Standing Offer issuance)*

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.

6.14 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 _____. *(Insert the name of the province or territory as specified by the Offeror in its offer, if applicable).*

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

[2035](#) (2014-09-25), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

Section 17 Interest on Overdue Accounts, of [2035](#) (2014-09-25), General Conditions - Higher Complexity - Services will not apply to payments made by credit cards. *(if applicable)*

6.2.2 Supplemental General Conditions

[4007](#) (2010-08-16), Supplemental General Conditions - Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

6.3 Term of Contract

6.3.1 Period of the 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 – Firm Unit Price(s)

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm unit price(s), as specified in Annex B" for a cost of \$ _____ *(as per each call-up)*. Customs duties are included and Applicable Taxes are extra.

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work, unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.5.2 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 "travelers", rather than those referring to "employees".

All travel must have the prior authorization of the Technical Authority.

6.5.3 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ _____ *(as per each call-up)*. 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.

6.5.4 Multiple Payments

SACC Manual clause [H1001C](#) (2008-05-12), Multiple Payments

6.5.5 T1204 - Direct Request by Customer Department

SACC Manual Clause [A9117C](#) (2007-11-30) T1204 - Direct Request by Customer Department

6.5.6 Time Verification

SACC Manual Clause [C0711C](#) (2008-05-12) Time Verification

6.5.7 Payment by Credit Card *(to be inserted at Standing Offer issuance)*

The following credit card is accepted: _____.

Solicitation No. - N° de l'invitation
KW405-131679/A
Client Ref. No. - N° de réf. du client
KW405-131679

Amd. No. - N° de la modif.
File No. - N° du dossier
TOR-5-38025

Buyer ID - Id de l'acheteur
tor003
CCC No./N° CCC - FMS No./N° VME

OR

The following credit cards are accepted: _____ and _____.

6.6 Invoicing Instructions

1. The Standing Offer Holder 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.
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 Standing Offer for certification and payment.
 - b. One (1) copy must be forwarded to the Standing Offer Authority identified under the section entitled "Authorities" of the Standing Offer.

6.7 Insurance

SACC Manual clause [G1005C](#) (2008-05-12) Insurance

ANNEX "A"
STATEMENT OF WORK

**TAXONOMIC ANALYSIS AND QUANTIFICATION OF LOWER FOODWEB TAXA: ENUMERATION,
SPECIES ID, BIOMASS & INTERPRETIVE REPORTING**

A1 Objective

The objective of the Work is to provide Environment Canada with the capacity to obtain consistent high quality data on the structure, abundance and ecophysiology of the lower foodweb from a range of surface waters. This will contribute to the Federal capacity to respond to and address the general degradation of our inland waters across Canada, and in particular, the following issues: i) Nutrient Management, ii) Harmful Algal Blooms, iii) Invasive Species, iv) Northern Development and v) Climate Change.

A2 Purpose

The purpose of this standing offer is to provide expertise, consistent data and interpretive reporting on the taxonomic identification, abundance and (where relevant) ecophysiological reporting of lower foodweb taxa in archived and current samples collected from planktonic, benthic/littoral and sediment zones in a range of surface waters from Canada and other areas.

A3 Background

Major Federal source-water programs across Canada and in partnership with international agencies require consistent high quality data to evaluate the current status of our fresh water resources and develop protection, remediation and monitoring programs. Currently there is a public perception that harmful algal blooms (HABs) episodes are increasing in Canada and worldwide, and that there is a fundamental shift in the structure and integrity of the lower foodweb which has severe implications for drinking and recreational waters, fisheries, aquaculture and tourist based industries.

Excessive nutrient inputs to water bodies are identified as a key factor driving HABs, degraded water quality and altered foodwebs. Harmful and invasive species are identified as a foremost societal and ecological threat, yet we are faced with major knowledge gaps namely in, the identity of these species and their potential impacts (toxins, taste-odour, foodweb degradation etc) and the key climatological, environmental and anthropogenic factors enabling their dominance and disruption of surface waters.

This is now even more important, given the unpredictability generated by the major changes in local and global climate, which is contributing to severe storm events, reduced dependability of water quality and supply, and ecosystem stress or disruption. In addition, changes in climate and demographics are favouring the spread of invasive species which have destructive and pervasive effects on aquatic ecosystem integrity; however we lack the data to unequivocally confirm these trends or to fully assess and control them. As a result, federal, provincial, local, and tribal authorities are increasingly faced with impaired surface waters without the information to i) assess and minimize threats to public health and well being, ii) minimize immediate impacts and iii) develop ecologically relevant targets and predictive and long-term management capacity.

HABs, Invasive Species, Nutrient Management, Northern Development and Climate Change are at present, among the highest profile environmental and socioeconomic issues. These issues are now being addressed through a series of Watershed and Climate Initiatives and EC development of a National HAB Program, as part of a wider international research network among Canadian, US, other countries, academic and private sectors. The Federal government is taking a role of leadership and support, in partnership with Provincial, municipal and local partners, to:

1. identify and monitor invasive species and their impacts
2. assess the key factors driving these events,

3. define the potential socioeconomic and ecological risks
4. acquire the knowledge and predictive capacity for effective management.

As noted above, our current ability to carry out this and other major ongoing and future source-water initiatives is critically limited by insufficient data on the health and resilience of aquatic biota, notably that of algal and cyanobacterial assemblages and other lower foodweb organisms. The generation of these data from the analysis of field and lab samples requires skilled taxonomic analyses by established, highly trained specialists. These experts are few in number and high in demand. The analysis is time consuming, and reporting and interpreting the data requires a high level of expertise and consistency. The work is essential to the delivery of key program components, thus require a skilled contractor.

A4 Scope of Work

The work will include the expert taxonomic identification, quantification and reporting of lower foodweb taxa in samples from planktonic, benthic/littoral and sediment zones. Samples may include any of the following taxa:

- Bacterioplankton;
- Picoplankton;
- Heterotrophic and mixotrophic flagellates;
- Cyanobacteria;
- Eukaryotic algae;
- Protozoa;
- Rotifers

The Contractor will be required to analyze samples collected from the field during warm and cold seasons from a diversity of aquatic lacustrine and riverine systems including the Great Lakes, Lake Winnipeg, Lake of the Woods, alpine, prairie, shield, boreal, polar and tropical regions, and from lab assays and cultures.

The Contractor must carry out these analyses using standard methods and the most recent revised taxonomic classification systems as detailed in References 1-5, and where required and relevant, relate these to species synonyms and existing taxonomic records collected by other studies using earlier classification systems.

Where relevant, the taxonomic analyses will include measurement and assessment of ecophysiological characteristics i.e. morphotypes, size and condition of cells/colonies, frequency of heterocysts, akinetes and other resting or reproductive stages (e.g. cysts, zygospores).

Where relevant, the Contractor will report the appearance of any non native taxa (i.e. invasive species). If required, the Contractor will relate the analyses to potential of these taxa for cyanotoxin production, and to other major issues such as climate change and nutrient management.

The Contractor will provide verification of the accuracy and precision of their analytical methods and other verifications of accuracy and precision as available.

Where required, the Contractor will provide interpretive data analysis and reporting for publication, presentation or other dissemination

Where required, the Contractor will also provide consultation and training workshops, and specific custom made supplies as on an "as and when requested" basis.

It is anticipated that in most cases samples will be shipped to the Contractor unless these are directly collected by the Contractor.

It is NOT acceptable for the contracted analyst to:

1. Use inconsistent, non-standard or invalid/ irrelevant methods of analyzing samples; or
2. Provide data in irrelevant units which cannot be used for comparative or evaluative purposes.

At a minimum:

- algal and cyanobacterial cells/filaments/colonies should be reported as biovolume
- picoplankton and bacteria, cysts/akinetes/fossils/eggs should be reported as abundance;
- microzooplankton should be reported as abundance or as abundance and biomass where required.

A5 References:

1a. Cyanobacteria, algae, mixotrophic flagellates and microzooplankton quantified using the standard Environment Canada EMAN protocol

(http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCIQFjAA&url=http%3A%2F%2Fwww.researchgate.net%2Fprofile%2FHedy_Kling2%2Fpublication%2F264881321_PROTOCOLS_FOR_MEASURING_BIODIVERSITY_Phytoplankton_in_Freshwater_by%2Flinks%2F54217f8e0cf203f155c6de82.pdf&ei=ptLVPbKMI7GsQSR64HYBQ&usq=AFQjCNE1x-0iGNbdRUk7cVY6-JITyL9Tog&bvm=bv.86956481.d.cGU&cad=rja based on the Utermöhl technique according to:

LUND, J.W.G., KIPLING, C. AND LE CREN, E.D. (1958) The inverted microscope method of estimating algal numbers and the statistical basis of estimations by counting. *Hydrobiol.*, 11, 143–170.

NAUWERCK, A. 1963. Die Beziehungen zwischen Zooplankton und Phytoplankton im See Erken. *Symb.Bot. Ups.* 17: 1-163

ROTT, E. SALMASO N., HOEHN E. 2007. Quality control of Utermöhl-based phytoplankton counting and biovolume estimates-an easy task or a gordian knot. *Hydrobiologia.* 578-141-146

UTERMÖHL, H. 1958 Zur Vervollkommnung der quantitativen Phytoplanktonmethodik. *Mitt. Int. Ver.Theor. Angew. Limnol.* 9: 1-38

1b. Picoplankton and bacteria identified using epifluorescence and staining methods e.g.

PORTER, K & FEIG, Y. 1980. The use of DAPI for identifying and counting aquatic microflora *Limnol. Oceanogr.*, 25: 943-948

2. Cyanobacteria identified according to Komárek's classification system. Keys should include:

ANAGNOSTIDIS, K., & KOMÁREK, J. 1988. Modern approach to the classification system of Cyanophytes. 3 -

Oscillatoriales. *Algological Studies* 50-53: 327-472. *Archiv. Fur Hydrobiologie, Supplementband* 80. Stuttgart.

KOMÁREK, J. & ANAGNOSTIDIS, K. 1989. Modern approach to the classification system of Cyanophytes. 4.

Nostocales. *Archiv. Fur Hydrobiologie, Supplement* 82: 247-345

KOMÁREK J. & ANAGNOSTIDIS K. (1998): Cyanoprokaryota 1. Teil: Chroococcales. - In: ETTL H., GÄRTNER G., HEYNIIG H. & MOLLENHAUER D. (eds): *Süßwasserflora von Mitteleuropa* 19/1, Gustav Fischer, Jena-Stuttgart-Lübeck-Ulm, 548 pp.

KOMÁREK J. & ANAGNOSTIDIS K. (2005): Cyanoprokaryota 2. Teil/ 2nd Part: Oscillatoriales. - In: BÜDEL B., KRIENITZ L., GÄRTNER G. & SCHAGERL M. (eds): *Süßwasserflora von Mitteleuropa* 19/2, Elsevier/Spektrum, Heidelberg, 759 pp.

KOMÁREK J. & KOMÁRKOVÁ J. 2002: Review of the European *Microcystis*-morphospecies (Cyanoprokaryotes) from nature. - *Czech Phycology* 2: 1 - 24

KOMÁREK J. & KOMÁRKOVÁ J. 2003: Phenotype diversity of the cyanoprokaryotic genus *Cylindrospermopsis* (Nostocales); review 2002. - *Czech Phycology* 3: 1 – 30

KOMÁREK J. & KOMÁRKOVÁ J. 2004: Taxonomic review of the cyanoprokaryotic genera *Planktothrix* and *Planktothricoides*. - *Czech Phycology* 4: 1-18

KOMÁREK J & J. KOMÁREKOVÁ 2006 Diversity of *Aphanizomenon* -like cyanobacteria *Czech Phycology, Olomouc*, 6: 1-32

KOMÁREK J. & ZAPOMÍLOVÁ E. 2007: Planktic morphospecies of the cyanobacterial genus *Anabaena* subg. *Dolichospermum* – 1. part: coiled types. - *Fottea* 7: 1–31

RAJANIEMI, P., KOMÁREK, J., HOFFMANN, L., HROUZEK, P., KASTOCSKÁ, K. & SIVONEN, K. (2005). Taxonomic consequences from the combined molecular and phenotype evaluation of selected *Anabaena* and *Aphanizomenon* strains. *Algological Studies* 117: 371-391.

WACKLIN, P., HOFFMANN, L. & KOMÁREK, J. 2009: Nomenclatural validation of the genetically revised cyanobacterial genus *Dolichospermum* (RALFS ex BORNET et FLAHAULT) comb. nova. - *Fottea* 9(1): 59–64

KOMÁREK, J., KAŠTOVSKÝ, J. & JEZBEROVÁ, J. 2011. Phylogenetic and taxonomic delimitation of the cyanobacterial genera *Aphanothece* and *Anathece*. *European Journal of Phycology* 46(3): 315–326.

KOMÁREK, JIRÍ ; MAREŠ, JAN. 2012 An update to modern taxonomy (2011) of freshwater planktic heterocytous cyanobacteria. *Hydrobiologia*, 698: 327-351

KOMÁREK, J. 2013. Cyanoprokaryota 3: Heterocytous Genera. In: Budel, B., Gartner, G., Krienitz, L., Schagerl, M.: Süßwasserflora von Mitteleuropa, Vol. 19/3, Spektrum Akademischer Verlag, 1130 pp. ISBN-13: 9783827409324

KOMÁREK, JIŘÍ. *Cyanoprokaryota*. Berlin Heidelberg : Springer Spektrum, 2013. 1130 s. (Süßwasserflora von Mitteleuropa : 19/3). ISBN 978-3-8274-0932-4.

KOMÁREK, J., ZAPOMĚLOVÁ, E., ŠMARDA, J., KOPECKÝ, J., REJMÁNKOVÁ, E., WOODHOUSE, J., NEILAN, B.A. & KOMÁRKOVÁ, J. 2013. Polyphasic evaluation of *Limnographis robusta*, a water-bloom forming cyanobacterium from Lake Atitlán, Guatemala, with a description of *Limnographis* gen. nov. Fottea 13: 39–52

3. Eukaryotic algae identified according to current keys and references, including

BOLTOVSKOY, A., (1999). Contribution to the knowledge of Dinoflagellates in the Argentine Republic (in Spanish). Facultad de Ciencias Naturales y Museo (PhD thesis). Universidad Nacional de La Plata, La Plata, Argentina, p. 119.

CARTY, S. (1993) Contribution to Dinoflagellate Flora of Ohio. Ohio J. Sci. 93(5):140-146

COESEL, P.F. M., MEESTERS, J. (2007) Desmids of the Lowlands : Mesotaeniaceae and Desmidiaceae of the European Lowlands Publisher Zeist : KNNV Publishing Publication year cop. Description 351 p + CD-ROM ill

COX, E.J. (1996) Identification of Freshwater Diatoms from Live Material. Chapman & Hall. 158 pp.

HINDÁK, F., KOMÁREK, J., MARVAN, P., AND RUZICKA, J. (1973). Kl'úč_Na Urcovanie-Výtrusných Rastlín. I. diel, Raisy. Bratislava.

HINDÁK F.(1977-1988) Studies on the Chlorococcal Algae (Chlorophyceae) Vols I,III,IV,V. Biol. Práce.

HINDÁK, F. (1990). Studies on the Chlorococcal Algae (Chlorophyceae). V. VEDA, Vydovatelstvo Slovensky Akademie Vied.

JAVORNICKY, P. AND POPOVSKY, J. (1971). Pyrrhophyta Common in Czechoslovakia. Hydrobiological Laboratory of the Czechoslovak Academy.

JOHN, D.M., B.A. WHITTON & A.J. BROOK. (2002). The Freshwater Algal Flora of the British Isles: An Identification Guide to Freshwater and Terrestrial Algae. Cambridge University Press. New York. 701 pages.

KLAVENESS, D. (1985). Classical and modern criteria for determining species of Cryptophyceae. Bulletin of Plankton Society of Japan 32:111-128.

KOMÁREK, J., & FOTT, B (1983). Chlorophyceae (Grünalgaen). Ordnung Chlorococcales. Huber-Pestalozzi, G., Eds. Das Phytoplankton des Süsswasser. Systematik und Biologie 7, Schweizerbart'ssche Verlagsbuchhandlung, Stuttgart. 1044pp

KOMÁREK J., & MARVAN P (1992) Morphological differences in natural populations of the genus *Botryococcus* (Chlorophyceae). Arch Protistenk 141:65–100

KOMÁREK, J. & VLASTA JANKOVSKÁ, I. (2001). Review of the Green Algal Genus *Pediastrum*; Implication for Pollenanalytical Research. Bibliotheca Phycologica: Band 108. Edited by J. Cramer. Gebrüder Borntraeger Verlag Berlin/Stuttgart. 127 pages.

KRAMMER, K. & LANGE-BERTALOT, H. (1986; 1988; 1991). Süßwasserflora von Mitteleuropa. Band 2. Bacillariophyceae. Teil 1-2.. Gustav Fischer Verlag, Stuttgart.

KRISTIANSEN, J. & PREISIG, H.R. (2007) Chrysophyte and Haptophyte Algae. 2. Teil/Part 2: Synurophyceae, Freshwater Flora of Central Europe.

LOGARES, R., SHALCHIAN-TABRIZI, K., BOLTOVSKOY, A., RENGEFORS, K. (2007) Extensive dinoflagellate phylogenies indicate infrequent marine–freshwater transitions. Molecular Phylogenetics and Evolution 45 (2007) 887–903

PATRICK, R. & REIMER, C.W. (1967). The Diatoms of the United States, Exclusive of Alaska and Hawaii. Volumes 1-2. Monograph of the Academy of Natural Sciences of Philadelphia

POPOVSKY, J AND PFEISTER, L. (1990). Dinophyceae (Dinoflagellida). In Süßwasserflora von Mitteleuropa. (Band 6). Eds Ettl, H., Gerloff, J., and Haynig, H. and Mollenhauer D. Gustav Fischer Verlag, Stuttgart.

WEHR, J.D. & SHEATH, R.G. (2003). Freshwater Algae of North America. Academic Press, Boston. 918 pages

WEST, W. & WEST, G.S. (1904-1912) A Monograph of the British Desmidiaceae. Volumes I.,II,III,IV, V Adlard and Son, London.

WHITFORD, L.A. & SCHUMACHER, G.J. (1984). A Manual of Fresh-Water Algae. Sparks Press, Raleigh, N.C.

4. Sediment samples: algal remains identified as in References 2-3 and if required and relevant to sample, using SEM keys listed in Reference 5

5. SEM material identified according to current keys and references, including

ASMUND, B.; KRISTIANSEN, J. 1986: The genus *Mallomonas*. A taxonomic survey based on ultrastructure of scales and bristles. Opera Botanica 85: 1-128.

CRONBERG, G. 1986: Chrysophycean cysts and scales in lake sediments. A review. In: KRISTIANSEN, J.; ANDERSEN, R. A. eds. Chrysophytes: aspects and problems. Cambridge, Cambridge University Press. Pp. 281-315.

HÅKANSSON H, KLING H: 1994 *Cyclotella agassizensis* nov. sp. and its relationship to *C. quillensis* Bailey and other prairie *Cyclotella* species. Diatom Research 1994, 9:289-301.

HÅKANSSON H: 2002 A compilation and evaluation of species in the general *Stephanodiscus*, *Cyclostephanos* and *Cyclotella* with a new genus in the family Stephanodiscaceae. Diatom Research , 17:1-139.

KLING, H.J., AND KRISTIANSEN, J. 1983. Scale-bearing Chrysophyceae (Mallomonadaceae) from central and northern Canada. Nord. J. Bot. 3: 269–290.

KRISTIANSEN, J. 1986: The ultrastructural bases of chrysophyte systematics and phylogeny. Critical reviews in plant science 4: 149-211.

NICHOLLS K.H. 1982. *Mallomonas* species (Chrysophyceae) from Ontario, Canada, including descriptions of two new species. Nova Hedwigia 36: 89–124.

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- NICHOLLS, K.H., and GERRATH, J.F. 1985. The taxonomy of *Synura* (Chrysophyceae) in Ontario with special reference to taste and odour in water supplies. *Can. J. Bot.* 63: 1482–1493.
- SIVER, P. A. 1991: The biology of *Mallomonas*. Hingham, Kluwer Academic Publishers.
- SIVER, P.A. 1995. The distribution of chrysophytes along environmental gradients: their use as biological indicators. In *Chrysophyte algae: ecology, phylogeny and development*. Edited by C.D. Sandgren, J.P. Smol, and J. Kristiansen. Cambridge University Press, Cambridge. pp. 232–268
- SIVER, P.A. & H. KLING (1997): Morphological observations of *Aulacoseira* using scanning electron microscopy. - *Can. J. Bot.* 75: 1807-1835.
- SMOL, J. P. (1995): Application of chrysophytes to problems in paleoecology. – In: SANDGREN, C. D., SMOL, J. P. & KRISTIANSEN, J. (eds): *Chrysophyte algae*, Cambridge University Press, Cambridge, 303–329pp.

6. Cyanobacterial and algal ecology: The Offeror must identify oral and written documents listed in their CV which pertain to and relate taxonomic data to the ecology of the taxa described; this may include discussion on diversity, biogeographical distribution, environmental niches and tolerance ranges, competitive strategies, food web interactions, resource (e.g. nutrients, light, food) limitation and acquisition mechanisms, life-cycle and reproductive strategies and invasive strategies.

A6 Deliverables

The deliverables required as a result of any call-up will be the analytical results and reports.

Data reports for sample batches of up to 20 samples are to be forwarded to Environment Canada within six (6) months following receipt of samples. Phytoplankton reports will include sizes and abundance and biovolume of each taxon in the sample; taxonomic classification; if present, resting stages/cysts/heterocysts.

Data reports are to be provided in hard and electronic copy (in Microsoft Office Excel file format), with a signed covering letter. Any problems with samples or data, including corrective actions taken, resolutions, and explanations of flagged data are to be documented with the data reports.

Raw data and all relevant laboratory notes are to be retained by the Contractor for a minimum period of 36 months following submission of samples. Raw data will include aliquot volumes, condition of sample, etc. for all samples, including original and re-analyses, dilutions, etc.

**ANNEX "B"
 BASIS OF PAYMENT**

Offerors must provide firm all inclusive unit prices in Canadian funds. The total amount of Harmonized Sales Tax (HST) is to be show separately, if applicable. Financial prices submitted in any other currency will result in the offer being deemed non-compliant and will be given no further consideration.

Pricing must be provided for all line items for the Initial standing Offer period and all optional periods. Prices stated in Annex B are firm for the period of the Standing Offer.

B1 Initial Standing Offer Period: one year from date of Standing Offer issuance; estimated date: September 1, 2015 to August 31, 2016

Item No.	Product Description	Firm Unit Prices
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	\$ /each
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	\$ /each
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	\$ /each
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	\$ /each
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	\$ /each
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	\$ /each
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	\$ /each
8	Field Sampling support - provision of sample containers and protocols	\$ / hour
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	\$ / hour

B2 Optional period 1: August 1, 2016 to September 31, 2017

Item No.	Product Description	Firm Unit Prices
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	\$ /each
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	\$ /each
3	Plankton/benthic sample taxonomic analysis (non-quantitative	\$ /each

	description) for cyanobacteria and/or algal taxa to genus level /species where possible.	
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	\$ /each
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	\$ /each
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	\$ /each
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	\$ /each
8	Field Sampling support - provision of sample containers and protocols	\$ / hour
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	\$ / hour

B3 Optional period 2: August 1, 2017 to September 31, 2018

Item No.	Product Description	Firm Unit Prices
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	\$ /each
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	\$ /each
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	\$ /each
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	\$ /each
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	\$ /each
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	\$ /each
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	\$ /each
8	Field Sampling support - provision of sample containers and protocols	\$ / hour
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	\$ / hour

B4 Optional period 3: August 1, 2018 to September 31, 2019

Item No.	Product Description	Firm Unit Prices
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	\$ /each

2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	\$	/each
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	\$	/each
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	\$	/each
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	\$	/each
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	\$	/each
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	\$	/each
8	Field Sampling support - provision of sample containers and protocols	\$	/ hour
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	\$	/ hour

B5 Optional period 4: August 1, 2019 to September 31, 2020

Item No.	Product Description	Firm Unit Prices	
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	\$	/each
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	\$	/each
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	\$	/each
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	\$	/each
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	\$	/each
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	\$	/each
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	\$	/each
8	Field Sampling support - provision of sample containers and protocols	\$	/ hour
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	\$	/ hour

B6 Travel and Living

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

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B, C and D of the [National Joint Council Travel Directive](#) and with the other provisions of the directive referring to "travelers", rather than those referring to "employees".

All travel must have the prior authorization of the Project Authority.

All payments are subject to government audit.

Estimated Cost: \$ _____. *(to be identified in each individual call-up)*

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Client Ref. No. - N° de réf. du client
KW405-131679

Amd. No. - N° de la modif.
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TOR-5-38025

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ANNEX "C"
QUARTERLY REPORTING FORM

Standing Offer No.	Start date of SO dd/mm/yyyy	End of SO dd/mm/yyyy
Total Value to Date \$	Total Value for Report Period \$	Start Date – End Date dd/mm/yyyy

Invoice No.	Date of Call-up	Total Value of Call-up

**ANNEX "D"
 TECHNICAL EVALUATION CRITERIA**

D1 Mandatory Technical Criteria

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Offerors must demonstrate that they meet every mandatory technical criterion by providing a concise and detailed response to each of the mandatory technical criteria. The technical bid should address each of the criteria in the order in which they appear.

Offerors must submit all CV's, certifications and any other supporting documentation with the bid by the bid closing date. Simply stating that the mandatory technical criteria are met is not sufficient. Failure to demonstrate meeting all of the mandatory technical criteria will result in the bid being deemed non-responsive.

Note: Reference is made in some of the Technical Evaluation criteria listed below to the Supporting Documentation Reference Guide. This Guide appears at C3 following the listing of criteria.

Item #	Mandatory Technical Criteria
M1	The Offeror must include with their offer Curricula Vitae (CVs) for each proposed analyst detailing their qualifications and years of experience.
M2	The Offeror must provide, for each proposed analyst, evidence of expertise through the description and publication of new and revised taxa of performance in the identification and enumeration of algal/cyanobacterial taxonomic samples.
M3	The Offeror must provide documentation (in the form of methods used (replicate sample counts, minimum number of counting units etc. cross comparison of sample counts with other analysts) of analysis Quality Control (QC) and variance demonstrating compliance with the range of accuracy associated with the standard methods defined under A5 References of Annex A Statement of Work, based on Quality Assurance(QA)/QC studies which have evaluated counting and sampling errors (Lund et al 1958, Nauwerck 1963, Willen 1976, Hobro & Willen 1977, Findlay & Kling 1998, Rott et al 2007, Vuorio et al 2007).
M4	The Offeror must demonstrate that each proposed analyst possesses a minimum of 25 years experience in the enumeration and taxonomic classification of algal, cyanobacterial taxa, as shown by Supporting Documents (Section C3) and CV. At least 10 of the 25 years must have been accrued within the last 12 years of the solicitation closing date.

D2 Point Rated Technical Criteria

The criteria contained herein will be used to evaluate each offer that has met all of the mandatory technical criteria. Offerors are advised to address each of the criteria in the order in which they appear and in sufficient depth in their offers to enable a thorough evaluation. Evaluations will be based solely on the information contained within the proposal.

Note: The minimum points must be obtained in accordance with the Supporting Documentation Reference Guide (C3 below) and the details of each individual criterion.

Item #	Point Rated Technical Criteria	Offer Page #	Minimum Points
R1	The Offeror should demonstrate that each proposed analyst has the expertise with algal and cyanobacterial taxa, as demonstrated by Supporting Documents describing taxa from each of the following aquatic systems: i) the Great Lakes; ii) Lake Winnipeg; iii) Lake of the Woods drainage systems; iv)		5

	Northern (Boreal and Shield) Lakes; v) Polar systems; vi) reservoirs and vii) lotic systems (rivers, streams).		
R2	<p>The Offeror should demonstrate that each proposed analyst possesses expertise in cyanobacterial and eukaryotic algal classification in accordance with the authorities listed in References 1, 2, and 3 of Annex A.</p> <p>The following exception to the Supporting Documentation Reference Guide applies to this criterion: only Supporting Documentation that has been published or presented within 15 years from the bid closing date will be evaluated.</p>		10
R3	<p>The Offeror should demonstrate that each proposed analyst possesses expertise in the use of relevant and acceptable methods including the Utermöhl inverted microscope method (as outlined in EMAN; see Reference 1 of Annex A and http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCIQFjAA&url=http%3A%2F%2Fwww.researchgate.net%2Fprofile%2FHedy_Kling2%2Fpublication%2F264881321_PROTOCOLS_FOR_MEASURING_BIODIVERSITY_Phytoplankton_in_Freshwater_by%2Flink_s%2F54217f8e0cf203f155c6de82.pdf&ei=ptLtVPbKMI7GsQSR64HYBQ&usq=AFQjCNE1x-QiGNbdRUK7cVY6-JITyL9Toq&bvm=bv.86956481.d.cGU&cad=rja) to analyze and report samples for phytoplankton, periphyton and littoral / benthic algae and cyanobacteria in accordance with the authorities listed in References 1 and 2 of Annex A.</p> <p>The following exception to the Supporting Documentation Reference Guide applies to this criterion: only publications will be considered (Supporting Documentation Referenced Guide item 1 - 4). <i>Any Invited Talks, Conference Presentation or Scientific Workshops proposed for this criterion will receive a score of zero.</i></p>		10
R4	The Offeror should demonstrate that each proposed analyst possesses expertise in the use of standard and acceptable methods to analyze samples for micrograzers (heterotrophic and mixotrophic flagellates, protozoa) in accordance with the authorities listed in Reference 1 of Annex A.		10
R5	The Offeror should demonstrate that each proposed analyst has the ability to identify, resolve and report cyanobacterial and algal specimens <u>to species level</u> using light microscopy in accordance with the revised European system of classifying Cyanobacteria based on Komarek's classification system (see References 1a, 2, 3, and 5 of Annex A).		15
R6	The Offeror should demonstrate that each proposed analyst has the ability to identify and enumerate potentially harmful, toxic or invasive cyanobacterial algal taxa in accordance with authorities listed in References 1a, 2, 3, 5, and 6 of Annex A.		15
R7	The Offeror should demonstrate that each proposed analyst has expertise in cyanobacterial and algal ecology by identifying relevant publications they have produced which interpret taxonomic data in respect to ecology in accordance with Reference 7 of Annex A.		25
R8	The Offeror should demonstrate that each proposed analyst has experience in the analysis and reporting of sediment core sample fossils of cyanobacterial, algal remains in accordance with authorities listed in Reference 4 of Annex A.		5
R9	The Offeror should demonstrate that there is at least one analyst on the team who has conducted or instructed algal/cyanobacterial taxonomic training workshops and would be therefore qualified to conduct these when requisitioned under the Standing Offer.		2.5
		Minimum Points	97.5

D3 Supporting Documentation Reference Guide

Listed below are the relative weightings for each of the individual types of Supporting Documentation (SD) that offerors must include as part of their submission. Points will be awarded based on the point allocation detailed below.

Offerors should include ALL relevant references in order to achieve their maximum potential technical score. Offerors must meet the minimum points identified for each criterion and each offer will be allocated points based upon the applicable references provided in the offer.

Offerors may use any combination of acceptable Supporting Documentation, as detailed within each individual point rated technical criterion, and subject to any exceptions detailed within the individual criterion, to achieve the necessary score identified.

For example, to achieve the requisite minimum of 5 points for R1, an offeror may provide supporting documentation that includes 5 Refereed publications (each being worth 1 point) or a combination of 2 Refereed publications (1 point each) and four technical reports (0.8 point each): $(2 \times 1 + 4 \times 0.8) = 2 + 3.2 = 5.2$ points); or any acceptable combination.

- SD1. Refereed Publication (1 point)** - an article published in a peer reviewed Journal (or periodical containing scholarly articles and/or current information on research and development in a particular subject field and that has been subject to a blind review process).
- SD2. Chapter (1 point)** - One of two or more major divisions of a peer reviewed and published book or other work.
- SD3. Technical report (0.8 point)** - a formal report (minimum 5 pages) giving details of the investigation and interpretive reporting of results of a scientific problem or database. Its contents may be classified, unclassified, or declassified with regard to security clearance. This publication type may include figures, tables and graphs and also cover a scientific paper or article in a non-refereed journal or periodical that records the current state or current position of scientific research and development.
- SD4. Theses (0.8 point)** - A dissertation advancing an original viewpoint based on scientific research as a requirement for an academic degree.
- SD5. Invited talk (0.8 point)** - invited seminar or presentation at a scientific conference or other venue to an audience from scientific, governmental or industrial institutions, not-for profit organizations or public.
- SD6. Conference presentations or poster (0.5 point)** - author-submitted presentation of work related to Annex "A", Statement of Work, at a local, national or international scientific conference.
- SD7. Workshop (0.5 point)** - organization or presentation at an educational seminar or series of meetings from the following supporting documents: **CV, websites, proof of contract and delivery of services, or letters of invitation**

(ref: Reitz, J. 2004. *ODLIS: Online Dictionary for Library and Information Science*. ISBN13:9781563089626 DOI: [10.1336/1563089629](http://dx.doi.org/10.1336/1563089629) (<http://lu.com/odlis/about.cfm>) and Heartsill Young, H. (Ed) 1983 *The ALA Glossary of Library and Information Science* American Library Association, Chicago).

ANNEX "E"
SAMPLE CURRICULUM VITAE (CV)

In order for the evaluation team to assess the technical offer, Offerors are strongly advised to submit CVs for qualified resources in strict accordance with the format provided herein. Failure to identify information in the manner prescribed herein may result in the Offeror not receiving the proper credit for their qualifications, and as a result, the offer may be declared non-compliant.

NAME: Doe, Robin.

Current Affiliation(s), Position

ADDRESS etc.

DEGREES: eg

Ph.D., area/faculty, University of ABC, year
M.Sc., area/faculty, University of ABC, year
B.Sc., area/faculty, University of ABC, year

HONOURS AND RECOGNITION:

Research Grants, academic and professional awards etc.

EMPLOYMENT HISTORY:

Current and past positions held, employee

SCHOLARLY AND PROFESSIONAL ACTIVITIES: Committees, Editorial and other Boards

- Committees, Working Groups
- Peer review, national and International scientific journals: scientific reviews for scientific journals including (list)
- Scientific and public consultation (national and local media, water industry, public conservation groups, government, academia)

SUPERVISORY DUTIES:

Technical and other staff, students etc.

TEACHING EXPERIENCE:

Academic and other

CONSULTATION:

Contracted and other

WRITTEN AND ORAL DOCUMENTS:

1) Summary (total count) according to the following categories:

Refereed Publications.....XX
ChaptersXX
Technical reports.....XX
ThesesXX
Invited talks.....XX
Conference presentations or poster.....XX
WorkshopsXX

2) Details

REFEREED PUBLICATIONS:

1. **Doe, R.**, Smith, P. & Elliot, N.. Year Title. Journal. **Vol** (issue): pages
2. Roy, J. W., **Doe, R.**, & Smith, P. 2008. Year Title. Journal. **Vol** (issue): pages
3. Jones F. & **Doe, R.** Year Title. Journal. **Vol** (issue): pages
4. **Doe, R.**, Charles, M., Hughes T, & Brown, B. Year Title. Journal. **Vol** (issue): pages
5. **Doe R.**, Black F. & Koll O. Year Title. Journal. **Vol** (issue): pages
6. Rich, J & **Doe, R.** Year Title. Journal. **Vol** (issue): pages
7. Mack L. & **Doe R.** Year Title. Journal. **Vol** (issue): pages
8. Brown, B., Mack, M. Charles, C. and **Doe, R** Year Title. Journal. **Vol** (issue): pages
9. Black, C. and **Doe, R.** Year Title. Journal. **Vol** (issue): pages
10. Pink, L., Smith, G., Howe, T & **Doe, R.** Year Title. Journal. **Vol** (issue): pages
11. Scott, T., & **Doe, R.** Year Title. Journal. **Vol** (issue): pages
12. **Doe, R.** Year Title. Journal. **Vol** (issue): pages
13. Zed, B. & **Doe, R.** Year Title. Journal. **Vol** (issue): pages
14. Cold, G., **Doe, J.** & Black, M. Year Title. Journal. **Vol** (issue): pages
15. **Doe, R.** Year Title. Journal. **Vol** (issue): pages.
16. **Doe, R.** and Rich J. Year Title. Journal. **Vol** (issue): pages
17. **Doe R.**, & Red A. Year Title. Journal. **Vol** (issue): pages

CHAPTERS:

18. **Doe, R.** Year. chapter *Title*. In: Smith, J (ed) Book title. Publisher. City\
19. **Doe, R.** & Smith, L. Year. *Title*. In: Frank, F (ed) Book title. Publisher. City
20. **Doe, R.** et al. Year. chapter *Title*. In: Jones (ed) Book title. Publisher. City
21. Smith J. & **Doe R.** Year. *Title* In: Jones, J & Frank, F (eds) Book title. Publisher. City

TECHNICAL REPORTS:

22. **Doe, R.** Year Title (Report No. AB-12). City, ST: Sponsoring Entity
23. **Doe, R.** Year Title (Report No. AB-12). City, ST: Sponsoring Entity
24. Institutional Author. Year Title (Report No. AB-12). City, Country: Sponsoring Entity.

THESES:

25. **Doe, R.** Year. *Title*. Masters Thesis, University of ABC, Anytown, Country. 100 p
26. **Doe, R.** Year. chapter *Title*. PhD Thesis, University of ABC, Anytown, Country. 200 p

INVITED TALKS:

27. **Doe, R.** Year Title. Venue & Organization, Anytown, Country
28. **Doe, R.** Year Title. Venue & Organization, Anytown, Country
29. **Doe, R.** Year Title. Venue & Organization, Anytown, Country
30. **Doe, R.** Year Title. Venue & Organization, Anytown, Country
31. **Doe, R.** Year Title. Venue & Organization, Anytown, Country
32. **Doe, R.** Year Title. Venue & Organization, Anytown, Country

CONFERENCE PRESENTATIONS OR POSTER:

33. **Doe, R.** & Smith, M. Year Title. Venue & Organization, Anytown, Country
34. **Doe, R.** & Jones, L. Year Title. Venue & Organization, Anytown, Country
35. **Doe, R.** & Black, N. Year Title. Venue & Organization, Anytown, Country
36. **Doe, R.** & Red, B. Year Title. Venue & Organization, Anytown, Country

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37. Doe, R. & Brown, K. Year Title. Venue & Organization, Anytown, Country

WORKSHOPS:

- 38. Doe, R. Year Title. Organization, Venue, Location**
- 39. Doe, R. Year Title. Organization, Venue, Location**
- 40. Doe, R. Year Title. Organization, Venue, Location**
- 41. Doe, R. Year Title. Organization, Venue, Location**
- 42. Doe, R. Year Title. Organization, Venue, Location**

ANNEX "F"
COMPLETED SAMPLE TECHNICAL EVALUATION GRID

Offerors are invited to review the following sample Technical Evaluation Grid based on the numbered written and oral reports and documents listed in the above sample CV in Annex E. It is meant to act as an aide to completing the Blank Mandatory Technical Evaluation Grid in Annex G. Offerors are strongly recommended to follow the structure developed herein to ensure that their offer receives full consideration.

Item #	Mandatory Technical Criteria	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
M2	The Offeror must provide, for each proposed analyst, evidence through the description and publication of new and revised taxa of performance in the identification and enumeration of algal/cyanobacterial taxonomic samples.	1,4,12						
M3	The Offeror must provide documentation (in the form of methods used (replicate sample counts, minimum number of cells/colonies/filaments etc. and fields/transects counted, recent (cross comparison of sample counts with at least one other analyst) of analysis Quality Control (QC) and variance demonstrating compliance with the range of accuracy associated with the standard methods defined under A5 References of Annex A.						31	38,39,40,41,42
M4	The Offeror must demonstrate that each proposed analyst possesses a minimum of 25 years' experience in the enumeration and taxonomic classification of algal/ cyanobacterial taxa, as shown by Supporting Documents (Section C3) and CV. <i>At least 10 of the 25 years must have been accrued within the last 12 years of the solicitation closing date</i>	3, 6,7, 8,11, 13, 16	20	22	26	28, 29,30, 31	33, 36, 34, 37	40
	Point Rated Technical Criterion	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
RC1	The Offeror should demonstrate that each proposed analyst has the expertise with algal and cyanobacterial taxa, as demonstrated by Supporting Documents SD1-SD7 describing taxa from each of the following aquatic systems: <i>in addition to the Great Lakes and Lake Winnipeg/Lake of the Woods drainage systems specified in (3) above:</i> Northern (Boreal and Shield) Lakes; ii) Polar systems; iii) reservoirs and iv) lotic systems (rivers, streams).	10	21	23,24	25	31	37	40

Item #	Mandatory Technical Criteria	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
RC2	The Offeror should demonstrate that each proposed analyst possesses expertise in current cyanobacterial and eukaryotic algal classification in accordance with the authorities listed in References 1, 2, and 3 of Annex A. <i>All Supporting Documentation published or presented within 10 years from the bid closing date will be used to evaluate score</i>	2, 12, 17	18, 20, 21	24	25	28	33, 34, 37	42
RC3	The Offeror should demonstrate that each proposed analyst possesses expertise in the use of relevant and acceptable methods including the Utermöhl inverted microscope method (as outlined in EMAN; Reference 1 of Annex A and http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCIQFjAA&url=http%3A%2F%2Fwww.researchgate.net%2Fprofile%2FHedy_Kling%2Fpublication%2F264881321_PROTOCOLS_FOR_MEASURING_BIODIVERSITY_Phytoplankton_in_Freshwater_by%2Flinks%2F54217f8e0cf203f155c6de82_pdf&ei=ptLTvPbKMI7GsQSR64HYBQ&usq=AFQjCNE1x-0iGNbdRUK7cVY6-JITyL9Toq&bvm=bv.86956481.d.cGU&cad=rja) to analyze and report samples for phytoplankton, periphyton and littoral / benthic algae and cyanobacteria in accordance with the authorities listed in References 1 and 2 of Annex A. <i>Invited Talks, Conference Presentation or Scientific Workshops proposed for this criterion will receive a score of zero.</i>	1, 2, 5, 12, 13, 16	18, 20	22, 23	25, 26			
RC4	The Offeror should demonstrate that each proposed analyst possesses expertise in the use of standard and acceptable methods to analyze samples for microzooplankton (heterotrophic and mixotrophic flagellates, protozoa) in accordance with the authorities listed in References 1 of Annex A.	1, 3, 7	19, 20, 21	22, 23	-	28	34, 36, 37	40
RC5	The Offeror should demonstrate that each proposed analyst has the ability to identify, resolve and report cyanobacterial and algal specimens <u>to species level</u> using light microscopy in accordance with the revised European system of classifying Cyanobacteria based on Komarek's classification system (References 1a, 2, 3,5 of Annex A).	5, 6, 8, 11, 13, 16	18, 20	22	26	28, 29, 30, 31	33, 34, 36, 37	40

Item #	Mandatory Technical Criteria	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
RC6	The Offeror should demonstrate that each proposed analyst has the ability to identify and enumerate potentially harmful, toxic or invasive cyanobacterial algal taxa in accordance with authorities in References 1a, 2, 3, 5 of Annex A.	4, 3, 8, 9, 13, 17	19, 20, 21	23	26	27, 30, 31	34, 36, 37	40
RC7	The Offeror should demonstrate that each proposed analyst has expertise in cyanobacterial and algal ecology by identifying relevant publications they have produced which interpret taxonomic data in respect to ecology in accordance with the authorities in References 7 of Annex A.	2, 4, 5, 6, 9, 10, 11, 14, 16, 17	18, 19, 20, 21	22, 23	25, 26	27, 28, 29, 30, 31, 32	33, 34, 36, 37	38, 40, 41
RC8	The Offeror should demonstrate that each proposed analyst has experience in the analysis and reporting of sediment core sample fossils of cyanobacterial and algal remains in accordance with authorities listed in Reference 4 of Annex A.	13	19, 21	-	-	29	33, 35	39
RC9	The Offeror should demonstrate from a CV or acceptable supporting documents that there is at least one analyst on the team who has conducted or instructed algal/ cyanobacterial taxonomic training workshops and would be therefore qualified to conduct these when requisitioned under the Standing Offer.							38, 39, 40, 41, 42

ANNEX "G"
MANDATORY TECHNICAL EVALUATION GRID

Offerors must complete the following Mandatory Evaluation Grid. Offerors must provide sufficient information from their CV in order to receive full marks. Offerors are advised to review the Completed Sample Mandatory Technical Evaluation Grid provided in Annex F.

Item #	Mandatory Technical Criteria	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
M2	The Offeror must provide, for each proposed analyst, evidence through the description and publication of new and revised taxa of performance in the identification and enumeration of algal/cyanobacterial taxonomic samples.							
M3	The Offeror must provide documentation (in the form of methods used (replicate sample counts, minimum number of cells/colonies/filaments etc. and fields/transects counted, recent (cross comparison of sample counts with at least one other analyst) of analysis Quality Control (QC) and variance demonstrating compliance with the range of accuracy associated with the standard methods defined under A5 References of Annex A.							
M4	The Offeror must demonstrate that each proposed analyst possesses a minimum of 25 years' experience in the enumeration and taxonomic classification of algal/ cyanobacterial taxa, as shown by Supporting Documents (Section C3) and CV. At least 10 of the 25 years must have been accrued within the last 12 years of the solicitation closing date							
	Point Rated Technical Criterion	SD1 Refereed Publications	SD2 Chapters	SD3 Reports	SD4 Theses	SD5 Invited Talks	SD6 Presentations/ Posters	SD7 Workshops
RC1	The Offeror should demonstrate that each proposed analyst has the expertise with algal and cyanobacterial taxa, as demonstrated by Supporting Documents SD1-SD7 describing taxa from each of the following aquatic systems: in addition to the Great Lakes and Lake Winnipeg/Lake of the Woods drainage systems specified in (3) above: Northern (Boreal and Shield) Lakes; ii) Polar systems; iii) reservoirs and iv) lotic systems (rivers, streams).							

RC2	The Offeror should demonstrate that each proposed analyst possesses expertise in current cyanobacterial and eukaryotic algal classification in accordance with the authorities listed in References 1, 2, and 3 of Annex A. All Supporting Documentation published or presented within 10 years from the bid closing date will be used to evaluate score						
RC3	The Offeror should demonstrate that each proposed analyst possesses expertise in the use of relevant and acceptable methods including the Utermöhl inverted microscope method (as outlined in EMAN; Reference 1 of Annex A and http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0C CIQFjAA&url=http%3A%2F%2Fwww.researchgate.net%2Fprofile%2FHedy_Kling2%2Fpublication%2F264881321_PR_OTOOLS_FOR_MEASURING_BIODIVERSITY_Phytoplankton_in_Freshwater_by%2Flinks%2F54217f8e0cf203f155c6de82.pdf&ei=ptLtVPbKMI7GsQsr64HYBQ&usq=AFQjCNE1x-0iGNbdRUK7cVY6-JITyL9Tog&bvm=bv.86956481.d.cGU&cad=rja) to analyze and report samples for phytoplankton, periphyton and littoral / benthic algae and cyanobacteria in accordance with the authorities listed in References 1 and 2 of Annex A. Invited Talks, Conference Presentation or Scientific Workshops proposed for this criterion will receive a score of zero.						
RC4	The Offeror should demonstrate that each proposed analyst possesses expertise in the use of standard and acceptable methods to analyze samples for microzooplankton (heterotrophic and mixotrophic flagellates, protozoa) in accordance with the authorities listed in References 1 of Annex A.						
RC5	The Offeror should demonstrate that each proposed analyst has the ability to identify, resolve and report cyanobacterial and algal specimens to species level using light microscopy in accordance with the revised European system of classifying Cyanobacteria based on Komarek's classification system (References 1a, 2, 3,5 of Annex A).						
RC6	The Offeror should demonstrate that each proposed analyst has the ability to identify and enumerate potentially harmful, toxic or invasive cyanobacterial algal taxa in accordance with authorities in References 1a, 2, 3, 5 of Annex A.						

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RC7	The Offeror should demonstrate that each proposed analyst has expertise in cyanobacterial and algal ecology by identifying relevant publications they have produced which interpret taxonomic data in respect to ecology in accordance with the authorities in References 7 of Annex A.							
RC8	The Offeror should demonstrate that each proposed analyst has experience in the analysis and reporting of sediment core sample fossils of cyanobacterial and algal remains in accordance with authorities listed in Reference 4 of Annex A.							
RC9	The Offeror should demonstrate from a CV or acceptable supporting documents that there is at least one analyst on the team who has conducted or instructed algal/ cyanobacterial taxonomic training workshops and would be therefore qualified to conduct these when requisitioned under the Standing Offer.							

**ANNEX "H"
 FINANCIAL EVALUATION**

For evaluation purposes, a bid price analysis will be performed using the firm unit prices submitted by the Offeror in accordance with Annex B, Basis of Payment and the estimated quantities. The estimated quantities are used as a guideline for evaluation purposes and are not a guarantee of actual usage.

G1 Initial Standing Offer Period: from date of Standing Offer issuance to March 31, 2016

Item No.	Product Description	Estimated Quantity	Firm Unit Price	Extended Price
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	500	\$ /each	\$
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	100	\$ /each	\$
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	50	\$ /each	\$
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	100	\$ /each	\$
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	2	\$ /each	\$
8	Field Sampling support - provision of sample containers and protocols	150	\$ /hour	\$
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	225	\$ /hour	\$
Total Estimated Price				\$

G2 Optional period 1: April 1, 2016 to March 31, 2017

Item No.	Product Description	Estimated Quantity	Firm Unit Price	Extended Price
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with	500	\$ /each	\$

	resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)			
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	100	\$ /each	\$
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	50	\$ /each	\$
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	100	\$ /each	\$
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	2	\$ /each	\$
8	Field Sampling support - provision of sample containers and protocols	150	\$ /hour	\$
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	225	\$ /hour	\$
Total Estimated Price				\$

G3 Optional period 2: April 1, 2017 to March 31, 2018

Item No.	Product Description	Estimated Quantity	Firm Unit Price	Extended Price
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs, protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	500	\$ /each	\$
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria	100	\$ /each	\$

	and/or algal taxa to genus level /species where possible.			
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	50	\$ /each	\$
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	100	\$ /each	\$
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	2	\$ /each	\$
8	Field Sampling support - provision of sample containers and protocols	150	\$ /hour	\$
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	225	\$ /hour	\$
Total Estimated Price				\$

G4 Optional period 3: April 1, 2018 to March 31, 2019

Item No.	Product Description	Estimated Quantity	Firm Unit Price	Extended Price
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs. protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	500	\$ /each	\$
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	100	\$ /each	\$
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	50	\$ /each	\$
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	100	\$ /each	\$
7	Workshop for a maximum of 10 people at the	2	\$ /each	\$

	following locations: Burlington, Winnipeg and Saskatoon			
8	Field Sampling support - provision of sample containers and protocols	150	\$ /hour	\$
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	225	\$ /hour	\$
Total Estimated Price				\$

G5 Optional period 4: April 1, 2019 to March 31, 2020

Item No.	Product Description	Estimated Quantity	Firm Unit Price	Extended Price
1	Plankton sample taxonomic analysis and enumeration for cyanobacteria, algal, mixotrophs, protozoa and rotifera with resolution of the most abundant algal taxa to species level where possible; including enumeration of cysts, heterocysts, akinetes (including data entry into spreadsheet or compatible format)	500	\$ /each	\$
2	Benthic/periphyton samples taxonomic analysis and enumeration for general algal composition and biomass with resolution to the genus and possibly species if feasible (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
3	Plankton/benthic sample taxonomic analysis (non-quantitative description) for cyanobacteria and/or algal taxa to genus level /species where possible.	100	\$ /each	\$
4	Plankton sample analysis for pico- and bacterioplankton (including data entry into spreadsheet or compatible format)	100	\$ /each	\$
5	Plankton/benthic sample taxonomic identification using SEM (including reporting/interpretation)	50	\$ /each	\$
6	Non siliceous and siliceous microfossils - identification and quantification in sediment cores	100	\$ /each	\$
7	Workshop for a maximum of 10 people at the following locations: Burlington, Winnipeg and Saskatoon	2	\$ /each	\$
8	Field Sampling support - provision of sample containers and protocols	150	\$ /hour	\$
10	Consultation services, interpretive data reporting and preparation for publication or dissemination for the different kinds of analyses - algal/cyanobacterial, sediment core sample fossils etc.	225	\$ /hour	\$
Total Estimated Price				\$

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G6 Total Evaluated Price

Periods	Total Estimated Prices
G1: Initial Standing Offer Period: from date of Standing Offer issuance to March 31, 2016	\$
G2: Optional period 1: April 1, 2016 to March 31, 2017	\$
G3: Optional period 2: April 1, 2017 to March 31, 2018	\$
G4: Optional period 3: April 1, 2018 to March 31, 2019	\$
G5: Optional period 4: April 1, 2019 to March 31, 2020	
Total Evaluated Price (sum of Total Estimated Prices G1 to G5)	\$