



**Request for Standing Offer (RFSO):
01B46-2015-0224**

FOR THE PROVISION OF

**Maintenance, Repair and Replacement of
Components -
Building Management System Monitoring and
Control System**

FOR

***HARROW RESEARCH AND DEVELOPMENT
CENTRE***

**Tenders must be received by: 2:00 PM, Eastern
Daylight Time**

On June 9th, 2016 at the following address:

Agriculture and Agri-Food Canada

Corporate Management Branch
Assets Team – Eastern Service Centre

TENDER RECEIVING UNIT

2001 Robert-Bourassa Blvd, Suite 671-TEN
Montreal, QC
H3A 3N2

Note: Tenders received at a location other than this one will be rejected.



TABLE OF CONTENTS

GENERAL INFORMATION

- 1.0 Project Summary
- 2.0 Security Requirements
- 3.0 Interpretation

PART 1: BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

- 1.0 Contractual Capacity
- 2.0 Acceptance of Terms and Conditions
- 3.0 Incurring Cost
- 4.0 Enquiries - Solicitation Stage
- 5.0 Rights of Canada
- 6.0 Substantiation of Professional Services Rates
- 7.0 Mandatory Clauses
- 8.0 Debriefing
- 9.0 Office of the Procurement Ombudsman
- 10.0 Optional Site Visit

PART 2: PROPOSAL PREPARATION INSTRUCTIONS & EVALUATION PROCEDURES

- 1.0 Applicable Laws
- 2.0 Submission of Proposal
- 3.0 Proposal Preparation Instructions
- 4.0 Preparation of Technical Proposal (Section 1)
- 5.0 Preparation of Financial Proposal (Section 2)
- 6.0 Certification Requirements (Section 3)
- 7.0 Evaluation Procedures
- 8.0 Request for Standing Offer Amendment(s)

PART 3: STANDING OFFER AND CALL-UPS TERMS AND CONDITIONS

A. STANDING OFFER

- 1.0 Offer
- 2.0 Security Requirements
- 3.0 Standing Offer General Conditions
- 4.0 Term of Standing Offer
- 5.0 Standing Offer Authority
- 6.0 Project Authority
- 7.0 Contractor Representative
- 8.0 Call-up Instrument
- 9.0 Limitation of Call-ups
- 10.0 Financial Limitation
- 11.0 Priority of Documents
- 12.0 Basis for Canada's Ownership of Intellectual Property



- 13.0 Replacement of Personnel
- 14.0 Damage to or Loss of Crown Property
- 15.0 Mandatory Certifications
- 16.0 Non-Permanent Resident

B. RESULTING CALL-UPS CLAUSES

- 1.0 Statement of Work
- 2.0 Call-ups General Conditions
- 3.0 Term of Call-up
- 4.0 Basis of Payment
- 5.0 Method of Payment
- 6.0 Direct Deposit
- 7.0 Invoicing Instructions
- 8.0 Insurance Requirements

LIST OF APPENDICES

- Appendix A – Call-ups General Conditions
- Appendix B - Statement of Work
- Appendix C - Basis of Payment
- Appendix D - Evaluation Procedures & Criteria
- Appendix E - Certification Requirements



GENERAL INFORMATION

1.0 PROJECT SUMMARY

Agriculture & Agri-Food Canada (AAFC) requires a Departmental Individual Standing Offer (DISO) agreement with a qualified contracting firm to perform work as outlined in the APPENDIX "B" on an "as and when requested basis" on behalf of the Harrow Research and Development Centre in Ontario. The DISO will cover the repair and maintenance of the Delta Building Management System (DBMS).

1.1 Standing Offer summary

1.1.1 The purpose of this Request for Standing Offer (RFSO) is to issue Departmental Individual Standing Offer (DISO) to obtain the services described in the Statement of Work - Appendix "B", at *the Harrow Research and Development Center*.

1.1.2 The period of the Standing Offer will be of *one* calendar year with the possibility to extend the Standing Offer for *one (1) additional three (3) years* period 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.

1.1.3 The total estimated budget for the SOs will be \$70 000.00 per year for a total of \$280 000.00 (Goods and Services tax or Harmonized sales tax not included) including years of option.

2.0 SECURITY REQUIREMENTS

Before Contract award, the Security requirements must be met. The bidder should submit evidence of security requirements with their bid submission. Refer to Part 2, Article 4.2 and Part 3, Article 2.0 for additional information.

Until the security screenings of the Contractor's personnel required by this Contract have been completed satisfactorily by Industrial Security Division (ISD), Contractor personnel **MAY NOT HAVE ACCESS** to sensitive (CLASSIFIED/DESIGNATED) information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an escort provided by the department or agency for which the Work is being performed.

3.0 INTERPRETATION

In the Request for Standing Offer "RFSO",

3.1 "Canada", "Crown", "Her Majesty", "the Government" or "Agriculture and Agri-Food Canada" or "AAFC" means Her Majesty the Queen in right of Canada, as represented by the Minister of Agriculture and Agri-Food;

3.2 "Call-up", "Contract" means an order issued by an Identified User duly authorized to issue a call-up against a particular standing offer. Issuance of a call-up to the Offeror constitutes acceptance of its offer and results in the creation of a contract



between Her Majesty the Queen in right of Canada and the Offeror for the goods, services or both described in the Call-up;

- 3.3 "Identified User" means a person or entity identified in the Standing Offer and authorized by the Standing Offer Authority to make call-ups against the Standing Offer;
- 3.4 "Standing Offer" means the written offer from the Offeror, the clauses and conditions set out in full text or incorporated by reference from these general conditions, annexes and any other document specified or referred to as forming part of the Standing Offer;
- 3.5 "Offeror", "Contractor" means the person or entity whose name appears on the signature page of the Standing Offer and who offers to provide goods, services or both to Canada under the Standing Offer;
- 3.6 "Minister" means the Minister of Agriculture and Agri-Food or anyone authorized to act on his/her behalf;
- 3.7 "Proposal" means an offer, submitted in response to a request from a Contracting Authority, that constitutes a solution to the problem, requirement or objective in the request;
- 3.8 "Bidder" means a person or entity submitting a Proposal in response to this RFSO;
- 3.9 "Work" means the whole of the activities, services, materials, equipment, software, matters and things required to be done, delivered or performed by the Contractor in accordance with the terms of this RFSO.

PART 1: BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

1.0 CONTRACTUAL CAPACITY

- 1.1 The Bidder must have the legal capacity to enter into legally binding contracts. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business and the country where the controlling interest/ownership of the organization is located as per Appendix E of this RFSO.

2.0 ACCEPTANCE OF TERMS AND CONDITIONS

- 2.1 Agriculture and Agri-Food Canada will only consider Proposals which accept Agriculture and Agri-Food Canada's terms and conditions.
- 2.2 The General Conditions attached in Appendix A and those set out in Part 3 of this RFSO shall form part of any Call-ups against a Standing Offer.



3.0 INCURRING COST

- 3.1 The cost to prepare the Proposal will not be reimbursed by Agriculture and Agri-Food Canada.
- 3.2 No cost incurred before receipt of a signed Call-up or specified written authorization from the Contracting Authority can be charged to any Resulting Contract.

4.0 ENQUIRIES - SOLICITATION STAGE

- 4.1 All enquiries or issues concerning this solicitation must be submitted in writing to the Contracting Authority named at Part 3A, section 5 of the RFSO. It is the responsibility of the Bidder to obtain clarification of the requirements contained herein, if necessary prior to submitting a proposal.
- 4.2 Enquiries and issues must be received by the Contracting Authority no later than **2 business days prior to the solicitation closing date** specified herein to allow sufficient time to provide a response. Enquiries or issues received after that time may not be able to be answered prior to the solicitation closing date.
- 4.3 To ensure consistency and quality of information provided to Bidders, the Contracting Authority will provide, simultaneously to all Bidders any information with respect to **significant** enquiries received and the replies to such enquiries without revealing the sources of the enquiries.
- 4.4 All enquiries and other communications with government officials throughout the solicitation period are to be directed **ONLY** to the Contracting Authority. Noncompliance with this condition during the proposal solicitation period may (for that reason alone) result in disqualification of a Proposal.
- 4.5 Meetings will not be held with individual bidders prior to the closing date/time of this RFSO, unless otherwise specified.
- 4.6 Bidders shall not place any conditions or make any assumptions that attempt to limit or otherwise modify the scope of Work pursuant to the Statement of Work, Appendix B.

5.0 RIGHTS OF CANADA

- 5.1 Canada reserves the right to:
 - 1. Accept any Proposal in whole or in part, without prior negotiation;
 - 2. Reject any or all Proposals received in response to this RFSO;
 - 3. Cancel and/or re-issue this RFSO at any time;
 - 4. Ask the Bidder to substantiate any claim made in the Proposal;
 - 5. Enter into negotiations with one or more Bidders on any or all aspects of their Proposals;
 - 6. Award one or more Standing Offers;
 - 7. Retain all Proposals submitted in response to this RFSO.



6.0 SUBSTANTIATION OF PROFESSIONAL SERVICES RATES

6.1 In Canada's experience, bidders will from time to time propose prices at the time of bidding that they later refuse to honour, on the basis that these prices do not allow them to recover their own costs and/or make a profit. When evaluating the prices for professional services bid, Canada may, but will have no obligation to, require price support for any prices proposed. Examples of price support that Canada would consider satisfactory include:

1. documentation (such as billing records) that shows that the Bidder has recently provided and invoiced another customer (with whom the Bidder deals at arm's length) for services similar to the services that would be provided under a resulting contract, and the fees charged are equal to or less than the price offered to Canada (to protect the privacy of the customer, the Bidder may black out the customer's name and personal information on the invoice submitted to Canada);
2. a signed contract between the Bidder and an individual qualified (based on the qualifications described in this bid solicitation) to provide services under a resulting contract where the amount payable under that contract by the Bidder to the resource is equal to or less than the price bid;
3. a signed contract with a subcontractor who will perform the work under any resulting contract, which provides that the required services will be provided at a price that is equal to or less than the price bid; or
4. details regarding the salary paid to and benefits provided to the individuals employed by the Bidder to provide services, where the amount of compensation, when converted to a per diem or hourly rate (as applicable), is equal to or less than the rate bid for that resource category.

Once Canada requests substantiation of the prices bid, it is the sole responsibility of the Bidder to submit information (either the information described in the examples above, or other information that demonstrates that it will be able to recover its own costs based on the prices it has proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the prices bid, while, at a minimum, recovering its own costs. Where Canada determines that the information provided by the Bidder does not demonstrate the Bidder's ability to recover its own costs in providing the prices bid, Canada may, at their sole discretion declare the bid non-compliant.

7.0 MANDATORY CLAUSES

7.1 Where the words "**must**", "**shall**" or "**will**" appear in this RFSO, the clause is to be considered as a mandatory requirement.

8.0 DEBRIEFING

8.1 After Standing Offer award, bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority.. The debriefing may be in writing, by telephone or in person at the discretion of the Contracting Authority.



9.0 OFFICE OF THE PROCUREMENT OMBUDSMAN

If you have issues or concerns regarding the solicitation, you have the option of raising them with the department or with the Office of the Procurement Ombudsman (OPO). The Office of the Procurement Ombudsman was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca. You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca.

10.0 OPTIONAL SITE VISIT

It is recommended that the Bidder or a representative of the Bidder visit the work site. Arrangements have been made for a tour of the work site. The site visit will be held on May 12, 2016 at 10:00 AM (EDT) at the Harrow Research and Development Centre located on 2585 County Road 20, Harrow, Ontario N0R 1G0.

Bidders will be requested to sign an attendance form. Bidders who do not attend or send a representative will not be given an alternative appointment but they will not be precluded from submitting a bid. Any clarifications or changes to the bid solicitation resulting from the site visit will be included as an amendment to the bid solicitation.

PART 2: PROPOSAL PREPARATION INSTRUCTIONS & EVALUATION PROCEDURES

1.0 APPLICABLE LAWS

- 1.1 The Standing Offer and the Call-ups shall be interpreted and governed, and the relations between the parties, determined by the laws in force in the Province of *Ontario*.
- 1.2 In their bid submission, bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their proposal, by deleting the Canadian province specified in the previous paragraph and inserting the Canadian province or territory of their choice. If no change is made, the bidder acknowledges the applicable law specified is acceptable to the Bidder.

2.0 SUBMISSION OF PROPOSAL

- 2.1 Proposals must be submitted in hard copy as described in Article 3.0.

Due to the nature of this RFSO electronic transmission of proposal by such means as electronic mail or facsimile to the Department of Agriculture and Agri-Food is not considered to be practical and therefore will not be accepted.

- 2.2 The proposal **MUST** be delivered to and received by the Contracting Unit no later than the **date and time indicated on the cover page of this RFSO**. The outside of



the envelope containing the proposal should include the RFSO number found on the cover page of the RFSO.

- 2.3 The onus for submitting proposals on time at the specified location rests with the Bidder. It is the Bidder's responsibility to ensure correct delivery of their proposal to the Contracting Authority.
- 2.4 The Bidders are advised that, due to security measures for building visitors, arrangements should be made in advance with the Contracting Authority for any planned in-person delivery of a proposal. Failure to do so may result in late receipt of a proposal.
- 2.5 Proposals submitted in response to this RFSO will not be returned.

3.0 PROPOSAL PREPARATION INSTRUCTIONS

3.1 The proposal **must** be structured in **THREE SEPARATE ENVELOPES** as indicated below:

Section 1	Technical Proposal (with no reference to price)	1 original hard copy and two copies
Section 2	Financial Proposal	1 original hard copy
Section 3	Certifications	1 original hard copy

- 3.2 The Bidder may **submit a proposal in either official language**.
- 3.3 Each copy of the proposal is to include the Bidder's legal entity name, the name of the Bidder's contact, address, telephone number, facsimile number, email address and the RFSO Number.

4.0 PREPARATION OF TECHNICAL PROPOSAL (Section 1)

4.1 In the Technical Proposal, the Bidder should demonstrate its understanding of the requirements of the **Statement of Work, Appendix B**, as well as demonstrate how the Bidder will meet the requirements of the **Evaluation Procedures and Criteria, Appendix D**.

4.2 Security Requirements

4.2.1 Security Profile Verification

The issuance of a contract is subject to a successful security screening by the Government of Canada security services.

Because of legal and ethics issues, the Bidder is not obligated to complete the "Personnel Screening Consent and Authorization Form" (tbs/sct 330-23e), available at <http://www.tbs-sct.gc.ca/tbsf-fsct/330-23-eng.asp> for each proposed employee at this point in time of the RFP process.



However, once the technical evaluation team will have evaluated the received proposals and will have identified the acceptable proposal, this requirement will become a mandatory requirement. Successful clearance by AAFC's Security Services is a mandatory condition before AAFC can award the contract.

Beyond the above mentioned issues, The Bidder have however the option to complete the form at their sole discretion at this point and provide the forms with their proposal.

Should a Bidder decide to complete the required information, *the initiative will only accelerate the transmission of the required documents by 2 or 3 weeks*. Whichever option the Bidder chooses, the decision has no bearing or influence on the technical team evaluation.

5.0 PREPARATION OF FINANCIAL PROPOSAL (Section 2)

In the Financial Proposal, the Bidder shall submit their financial offer by completing and signing Appendix "C" - Basis of Payment. Goods and Services Tax or Harmonized Sales Tax must not be included in the rates submitted to provide the services requested in accordance with the Statement of Work, **Appendix B**.

Offerors must submit a rate for the service identified in Part A of Appendix "C", for each working time period and the total price for the first year and for the optional 3 years period in Part B of Appendix "C". Only greyed out boxes should be left blank.

The requirements of the Financial Proposal are detailed in Evaluations Procedures and Criteria Appendix D.

Prices shall not appear in any area of the proposal except in the Financial Proposal.

- 5.1 The Bidder may revise his/her tender by facsimile, or letter provided it is received before the RFSO Closing Time. Any change resulting in an increase in the RFP price must be supported by a suitable increase in the security deposit.

However, any indication of price modification shall not reveal the amount of the original or the revised total price. Any indication of the old or the new total price will get the RFP discarded automatically.

6.0 CERTIFICATION REQUIREMENTS (Section 3)

In order to be awarded a Standing Offer, the certifications attached in **Appendix E** will be required. The certifications should be submitted with the proposal. Canada may declare a bid non-responsive if the certifications are not submitted or completed as required. Where Canada intends to reject a proposal pursuant to this paragraph, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time frame period will render the proposal non-responsive.



Compliance with the certifications the Bidder provides to Canada is subject to verification by Canada. The Contracting Authority shall have the right to ask for additional information to verify that the Bidder is compliant with the applicable certifications before and after award of a Standing Offer. Any certification made by the Bidder that is determined to be untrue, whether made knowingly or unknowingly, or any failure to comply with the certifications or comply with the request of the Contracting Authority for additional information, will render the bid non-responsive.

7.0 EVALUATION PROCEDURES

7.1 Proposals will be evaluated in accordance with the Evaluation Procedures and Criteria specified in **Appendix D**. Proposals received will be compared separately against the evaluation criteria identified therein for the total requirement described in this RFP and in conjunction with the accompanying Statement of Work (**Appendix B**).

7.2 An evaluation team composed of representatives of the Department of Agriculture and Agri-Food Canada will evaluate the Proposals on behalf of Canada.

7.3 The evaluation team reserves the right, but is not obligated, to perform any of the following tasks:

- a) seek clarification or verification from bidders regarding any or all information provided by them with respect to the bid solicitation;
- b) contact any or all references supplied by bidders to verify and validate any information submitted by them;
- c) request, before award of any Standing Offer, specific information with respect to bidders' legal status;
- d) verify any information provided by bidders through independent research, use of any government resources or by contacting third parties;
- e) interview, at the sole costs of bidders, any bidder and/or any or all of the resources proposed by bidders to fulfill the requirement of the bid solicitation.

8.0 REQUESTS FOR STANDING OFFER AMENDMENT(S)

8.1 Any modifications to this RFSO will be made through an amendment which will be posted publicly via Buyandsell.gc.ca.

PART 3: STANDING OFFER AND CALL-UPS TERMS AND CONDITIONS

A. STANDING OFFER

1.0 OFFER

1.1 The contractor will provide the services identified in Statement of Work, Appendix B

2.0 SECURITY REQUIREMENTS

There is a security requirement associated with the work.



1. The Contractor/Offeror must, at all times during the performance of the Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to **PROTECTED** information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by AAFC .
3. The Contractor/Offeror **MUST NOT** remove any **PROTECTED** information or assets from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of AAFC .

3.0 STANDING OFFER GENERAL CONDITIONS

3.1 General

The Offeror acknowledges that a standing offer is not a contract and that the issuance of a Standing Offer and Call-up Authority does not obligate or commit Canada to procure or contract for any goods, services or both listed in the Standing Offer. The Offeror understands and agrees that Canada has the right to procure the goods, services or both specified in the Standing Offer by means of any other contract, standing offer or contracting method.

3.2 Offer

1. The Offeror offers to provide and deliver to Canada the goods, services or both described in the Standing Offer, in accordance with the pricing set out in the Standing Offer if and when the Identified User may request such goods, services or both, in accordance with the conditions listed at subsection 2 below.
2. The Offeror understands and agrees that:
 - a. a call-up against the Standing Offer will form a contract only for those goods, services, or both, which have been called-up, provided that such Call-up is made in accordance with the provisions of the Standing Offer;
 - b. Canada's liability is limited to that which arises from call-ups against the Standing Offer made within the period specified in the Standing Offer;
 - c. Canada may require that the purchase of goods, services or both listed in the Standing Offer be made using an electronic purchasing tool. Canada will provide the Offeror at least three (3) months' notice before imposing such a requirement;
 - d. the Standing Offer cannot be assigned or transferred in whole or in part;



- e. the Standing Offer may be set aside by Canada at any time.

3.3 Call-ups

If applicable, Identified Users will use the form specified in the Standing Offer to order goods, services or both. Goods, services or both may also be ordered by other methods such as telephone, facsimile or electronic means. With the exception of call-ups paid for with a Government of Canada acquisition card (credit card), call-ups made by telephone must be confirmed in writing on the document specified in the Standing Offer.

Call-ups against the Standing Offer paid for with the Government of Canada acquisition card (credit card) at point of sale must be accorded the same prices and conditions as any other Call-up.

3.4 Withdrawal

In the event that the Offeror wishes to withdraw the Standing Offer after authority to call-up against the Standing Offer has been given, the Offeror must provide no less than thirty (30) days' written notice to the Standing Offer Authority, unless specified otherwise in the Standing Offer. The thirty (30) days' period will start upon receipt of the notification by the Standing Offer Authority and the withdrawal will be effective at the expiry of that period. The Offeror must fulfill any and all call-ups which are made before the expiry of that period.

3.5 Revision

The period of the Standing Offer may only be extended, or its usage increased, by the Standing Offer Authority issuing a revision to the Standing Offer in writing.

3.6 Disclosure of Information

The Offeror agrees to the disclosure of its standing offer unit prices or rates by Canada, and further agrees that it will have no right to claim against Canada, the Identified User, their employees, agents or servants, or any of them, in relation to such disclosure.

4.0 TERM OF STANDING OFFER

4.1 Period of the Standing Offer

The period for making call-ups against the SO will be one (1) calendar year from the date of signature of the SO agreement.

4.2 Extension of Standing Offer

The Contractor grants to Canada the irrevocable option to extend the duration of the Standing Offer by up to one additional (3) three year period under the same terms and conditions.



- 4.2.1 Canada may exercise this option at any time by sending a notice to the Contractor prior to the Standing Offer expiry date.
- 4.2.2 The Contractor agrees that, during the extended period of the Standing Offer resulting from Canada's exercise of its option, the cost will be in accordance with the provisions in Appendix C of the Standing Offer.
- 4.2.3 The option may only be exercised by the Contracting Authority and will be evidenced for administration purposes only, through a written Standing Offer amendment.

5.0 STANDING OFFER AUTHORITY

- 5.1 The Standing Offer Authority is:

Carol Rahal
Contracting Agent

Agriculture and Agri-Food Canada
Eastern Service Centre
2001 Robert-Bourassa, Suite 671-TEN
Montreal, Quebec, H3A 3N2
Telephone: 514-315-6143
Facsimile: 514-283-1918
E-mail address: carol.rahal@agr.gc.ca

- 5.2 The Contracting Authority (or authorized representative) is responsible for the management of the Standing Offer. Any changes to the Standing Offer and the Call-ups must be authorized in writing by the Contracting Authority. The Contractor is not to perform Work in excess of or outside the scope of the Call-up based on verbal or written requests or instructions from any government personnel other than the aforementioned officer.

6.0 PROJECT AUTHORITY

- 6.1 The Project Authority for the Standing Offer is:

The contact information for the Project Authority will be provided at time of Standing Offer award.

- 6.2 The Project Authority, or authorized representative, is responsible for:
 - 1. All matters concerning the technical content of the Work under the Standing Offer;
 - 2. Defining any proposed changes to the scope of the Work, but any resulting change can only be confirmed by a Standing Offer amendment issued by the Contracting Authority;
 - 3. Inspection and acceptance of all Work performed as detailed in the Statement of Work and;
 - 4. Review and approve all invoices submitted.



7.0 CONTRACTOR REPRESENTATIVE

7.1 The Contractor Representative for the Standing Offer is:

The contact information for the Contractor Representative will be provided at time of Standing Offer award.

7.2 The duties and responsibilities of the Contractor Representative shall include the following:

1. Responsible for the overall management of the Standing Offer and Call-ups;
2. Ensure that the Call-ups is administered in accordance with the terms and conditions of the Standing Offer;
3. Act as a single point of contact to resolve any contractual disputes that may arise. The Contract Representative must have direct access to the level of management within the Contractor's organization vested with the decision-making authority for contractual matters;
4. Shall be established as the only recognized individual from the Contractor's organization to speak on behalf of the Contractor for purposes of Contract management;
5. Monitor all resources that are providing services/deliverables in accordance with the Standing Offer;
6. Liaise with the Project Authority on all matters concerning technical aspects of the Work and performance of its resources; and
7. Manage the transition of any potential resource(s) turnover during the period of the Work.

8.0 CALL-UP INSTRUMENT

The Work will be authorized or confirmed by an AAFC Contracting Officer using a Call-up Against a Standing Offer.

9.0 LIMITATION OF CALL-UPS

Individual call-ups against the Standing Offer must not exceed \$20,000.00 (Applicable Taxes included).

10.0 FINANCIAL LIMITATION

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of \$70 000.00 per (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 3 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.

11.0 PRIORITY OF DOCUMENTS

11.1 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.

1. the call up against the Standing Offer, including any annexes;
2. the articles of the Standing Offer;
3. The Statement of Work, Appendix B hereof;
4. The General Conditions, Appendix A hereof;
5. Basis of Payment, Appendix C hereof;
6. Certification Requirements, Appendix E
7. Request for Standing Offer number 01B46-15-0224;
8. Contractor's Proposal dated *(to be inserted at Standing Offer award)*.

12.0 BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY

In this section of the RFSO,

- 12.1 "Material" means anything that is created or developed by the Contractor as part of the Work under Call-ups, and in which copyright subsists, but does not include computer programs and related software documentation.
- 12.2 Agriculture and Agri-Food Canada has determined that any intellectual property arising from the performance of the Work under call-ups will vest in Canada, on the following grounds:

Pursuant to 6.5 of the Treasury Board Policy on Title to Intellectual Property Arising under Crown Procurement Contracts, Canada has opted to own the intellectual property rights in any Material subject to copyright that is created or developed as part of the Work, with the exception of computer software or any documentation pertaining to such software.

13.0 REPLACEMENT OF PERSONNEL

- 13.1. The Contractor will provide the services of the personnel named in the Contractor's Proposal to perform the Work, unless the Contractor is unable to do so for reasons which are beyond its control.
- 13.2 Should the Contractor at any time be unable to provide their services, the Contractor will contact the Project Authority immediately. In such case, the Contractor is responsible to provide replacement Contractor or personnel who shall be of similar skills and experience as stated in **the Evaluation Procedures and Criteria, Appendix D**.
- 13.3 The Contractor shall propose replacement personnel for the Project Authority's review within 5 working days (resume and references). The Contractor shall submit,



in writing, to the Project Authority the reasons for the removal of personnel from the Work; the name of the proposed replacement person(s); and the qualifications and experience of the proposed replacement person(s). The Project Authority reserves the right to interview any personnel proposed to be assigned to the Work.

- 13.4 Personnel assigned pursuant to the requirements will be capable of performing the Work at a reasonable level of competence. Should any assigned personnel be deemed unsuitable by the Project Authority the Contractor shall provide an immediate replacement of suitable ability that is acceptable to the Project Authority.
- 13.5 The Contractor shall supply competent back-up personnel so that in the event of unforeseen sickness, accident, or any cause which renders a specific individual unavailable, such individuals can be replaced within five (5) working days by a person of like abilities and qualifications.
- 13.6 The resources assigned for the Standing Offer will be measured regularly for quality of services rendered. The measurement will be based on the quality and timeliness of the deliverables specified in the Statement of Work. In the event that quality and deliverables are not produced as and when requested, in any given month, the Crown has the right to request that the Contractor replace the assigned resources immediately, in accordance with Standing Offer clauses included in or referenced in the RFSO.
- 13.7 In no event shall the Contractor allow performance of the Work by unauthorized and/or unqualified personnel, whether initially named resources or replacement personnel. In addition, acceptance of any replacements by the Project Authority shall not relieve the Contractor from responsibility for failure to meet the requirements of the Standing Offer.

14.0 DAMAGE TO OR LOSS OF CROWN PROPERTY

- 14.1 The Contractor shall reimburse Canada any cost or expenses due to the damage to or loss of Crown-owned property resulting from the Call-up or the carrying out thereof, or shall, upon reasonable notice, promptly repair such damage or substitute such loss to Canada's satisfaction.

15.0 MANDATORY CERTIFICATIONS

- 15.1 Compliance with the certifications the Contractor has provided Canada is a condition of the Standing Offer and Call-ups and subject to verification by Canada during the entire period of the Standing Offer. In the event that the Contractor does not comply with any certification or that it is determined that any certification made by the Contractor is untrue, whether made knowingly or unknowingly, the Minister shall have the right, pursuant to the default provisions of the Call-ups, to terminate the Standing Offer and Call-ups for default.

16.0 NON-PERMANENT RESIDENT (*the non-applicable clause will be deleted at Standing Offer award*)



16.1 (CANADIAN CONTRACTOR)

The Contractor must comply with Canadian immigration requirements applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Contract. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Standing Offer, the Contractor should immediately contact the nearest Service Canada regional office to enquire about Citizenship and Immigration Canada's requirements to issue a temporary work permit to a foreign national. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

16.2 (FOREIGN CONTRACTOR)

The Contractor must comply with Canadian immigration legislation applicable to foreign nationals entering Canada to work temporarily in fulfillment of the Standing Offer. If the Contractor wishes to hire a foreign national to work in Canada to fulfill the Standing Offer, the Contractor should immediately contact the nearest Canadian Embassy, Consulate or High Commission in the Contractor's country to obtain instructions, information on Citizenship and Immigration Canada's requirements and any required documents. The Contractor is responsible to ensure that foreign nationals have the required information, documents and authorizations before performing any work under any Call-ups in Canada. The Contractor is responsible for all costs incurred as a result of non-compliance with immigration requirements.

B. CALL-UPS CLAUSES

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

1.0 STATEMENT OF WORK

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

2.0 CALL-UPS GENERAL CONDITIONS

2.1 The General Conditions attached in **Appendix A** shall form part of any Resulting Contract.

3.0 TERM OF CALL-UP

3.1 Period of the Call-up

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

4.0 BASIS OF PAYMENT

4.1 For the services provided, Agriculture and Agri-Food Canada will pay the Contractor in accordance with the attached Basis of Payment, Appendix C for Work performed pursuant to the Call-up.



5.0 METHOD OF PAYMENT

Payment by AAFC for the Work will be made following delivery, inspection and acceptance of the Work, and upon presentation of invoices and any other substantiating documentation as AAFC requires.

AAFC will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b) all such documents have been verified by AAFC;
- c) the Work delivered has been accepted by AAFC

6.0 DIRECT DEPOSIT

The Contractor agrees to receive payment through direct deposit to a financial institution.

Government of Canada considers privacy and security of utmost importance in the issuance of payments. Any information you provide to the Government of Canada in support of Direct Deposit is protected under the Government of Canada *Privacy Act and Access to Information Act (R.S.C., 1985, c. A-1)*.

Additional information is available at:
www.tpsgc-pwgsc.gc.ca/recgen/txt/depot-deposit-eng.html

7.0 INVOICING INSTRUCTIONS

- 7.1 Payment will only be made pursuant to the general conditions specified in the Appendix A and upon submission of a satisfactory invoice duly supported by specified release documents and other documents called for under the Call-up.
- 7.2 One (1) original of the invoice together with attachments, shall be forwarded to the Project Authority at the address noted in Part 3A, Article 6.0.

8.0 INSURANCE REQUIREMENTS

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



APPENDIX A
GENERAL CONDITION

APPENDIX A

GENERAL CONDITIONS

GC1. INTERPRETATION

- 1.1 In the contract,
- 1.1 "Applicable Taxes" means the Goods and Services Tax (GST), the Harmonized Sales Tax (HST), and any provincial tax, by law, payable by Canada such as, the Quebec Sales Tax (QST) as of April 1, 2013;
- 1.2 "Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada; "Contractor" means the person, entity or entities named in the Contract to supply goods, services or both to Canada;
- 1.3 "Minister" means the Minister of Agriculture and Agri-Food Canada or anyone authorized;
- 1.4 "Party" means Canada, the Contractor, or any other signatory to the contract and "Parties" means all of them;
- 1.5 "Work" unless otherwise expressed in the Contract, means everything that is necessary to be done, furnished or delivered by the Contractor to perform the Contractor's obligations under the Contract.

GC2. Powers of Canada

All rights, remedies and discretions granted or acquired by Canada under the Contract or by law are cumulative, not exclusive.

GC3. General Conditions

The Contractor is an independent contractor engaged by Canada to perform the Work. Nothing in the Contract is intended to create a partnership, a joint venture or an agency between Canada and the other Party or Parties. The Contractor must not represent itself as an agent or representative of Canada to anyone. Neither the Contractor nor any of its personnel is engaged as an employee or agent of Canada. The Contractor is responsible for all deductions and remittances required by law in relation to its employees.

GC4. Conduct of the Work

- 4.1 The Contractor represents and warrants that:
- (a) It is competent to perform the Work;
 - (b) It has the necessary qualifications, including knowledge, skill and experience, to perform the Work, together with the ability to use those qualifications effectively for that purpose; and
 - (c) It has the necessary personnel and resources to perform the Work.
- 4.2 Except for government property specifically provided for in the Contract, the Contractor shall supply everything necessary for the performance of the Work, including all the resources, facilities, labor and supervision, management, services, equipment, materials, drawings, technical data, technical assistance, engineering services, inspection and quality assurance procedures, and planning necessary to perform the Work.

4.3 The Contractor shall:

- (a) Carry out the Work in a diligent and efficient manner;
- (b) Apply as a minimum, such quality assurance tests, inspections and controls consistent with those in general usage in the trade and that are reasonably calculated to ensure the degree of quality required by the Contract; and
- (c) Ensure that the Work:
 - (1) is of proper quality, material and workmanship;
 - (2) Is in full conformity with the Statement of Work; and
 - (3) Meets all other requirements of the Contract.

4.4 Notwithstanding acceptance of the Work or any part thereof, the Contractor warrants that the Work shall be of such quality as to clearly demonstrate that the Contractor has performed the Work in accordance with the undertaking in subsection 4.3.

GC5. Inspection and Acceptance

5.1 The Work will be subject to inspection by Canada. Should any part of the Work whether it be a report, document, good or service not be in accordance with the Contract or not be done to the satisfaction of the Canada, as submitted, Canada will have the right to reject it or require its correction at the sole expense of the Contractor before making payment.

5.2 The Contractor will be in default of the Contract if the Work is rejected by Canada or if he fails to correct the Work within a reasonable delay.

GC6. Amendments and Waivers

6.1 No design change, modification to the Work, or amendment to the Contract shall be binding unless it is incorporated into the Contract by written amendment or design change memorandum executed by the authorized representatives of Canada and of the Contractor.

6.2 While the Contractor may discuss any proposed changes or modifications to the scope of the Work with the representatives of Canada, Canada shall not be liable for the cost of any such change or modification until it has been incorporated into the Contract in accordance with subsection 6.1.

6.3 No waiver shall be valid, binding or affect the rights of the Parties unless it is made in writing by, in the case of a waiver by Canada, the Contracting Authority and, in the case of a waiver by the Contractor, the authorized representative of the Contractor.

6.4 The waiver by a Party of a breach of any term or condition of the Contract shall not prevent the enforcement of that term or condition by that Party in the case of a subsequent breach, and shall not be deemed or construed to be a waiver of any subsequent breach.

GC7. Time of the Essence

It is essential that the Work be performed within or at the time stated in the Contract.

GC8. Excusable delay

8.1 Any delay by the Contractor in performing the Contractor's obligations under the Contract which occurs without any fault or neglect on the part of the Contractor its subcontractors, agents or employees or is caused by an event beyond the control of the Contractor, and which could not have been avoided by the Contractor without incurring unreasonable cost through the use of work-around plans including alternative sources or other means, constitutes an excusable delay.

- 8.2 The Contractor shall give notice to the Minister immediately after the occurrence of the event that causes the excusable delay. The notice shall state the cause and circumstances of the delay and indicate the portion of the Work affected by the delay. When requested to do so by the Minister, the Contractor shall deliver a description, in a form satisfactory to the Minister, of work-around plans including alternative sources and any other means that the Contractor will utilize to overcome the delay and Endeavour to prevent any further delay. Upon approval in writing by the Minister of the work-around plans, the Contractor shall implement the work around plans and use all reasonable means to recover any time lost as a result of the excusable delay.
- 8.3 Unless the Contractor complies with the notice requirements set forth in the Contract, any delay that might have constituted an excusable delay shall be deemed not to be an excusable delay.
- 8.4 If an excusable delay has continued for thirty (30) days or more, Canada may, by giving notice in writing to the Contractor, terminate the Contract. In such a case, the Parties agree that neither will make any claim against the other for damages, costs, expected profits or any other loss arising out of the termination or the event that contributed to the excusable delay. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.
- 8.5 Unless Canada has caused the delay by failing to meet an obligation under the Contract, Canada will not be responsible for any cost incurred by the contractor or any subcontractors or agents as a result of an excusable delay.
- 8.6 If the Contract is terminated under this section, Canada may require the Contractor to deliver to Canada, in the manner and to the extent directed by Canada, any completed parts of the Work not delivered and accepted before the termination and anything that the Contractor has acquired or produced specifically to perform the Contract. Canada will pay the Contractor:
- (a) The value, of all completed parts of the Work delivered to and accepted by Canada, based on the Contract price, including the proportionate part of the Contractor's profit or fee included in the Contract price; and
 - (b) The cost to the Contractor that Canada considers reasonable in respect of anything else delivered to and accepted by Canada.
- 8.7 The total amount paid by Canada under the Contract to the date of termination and any amounts payable under this subsection must not exceed the Contract price.

GC9. Termination of convenience

- 9.1 Notwithstanding anything in the Contract, the Minister may, by giving notice to the Contractor, terminate or suspend the Contract immediately with respect to all or any part or parts of the Work not completed.
- 9.2 All Work completed by the Contractor to the satisfaction of Canada before the giving of such notice shall be paid for by Canada in accordance with the provisions of the Contract and, for all Work not completed before the giving of such notice, Canada shall pay the Contractor's costs as determined under the provisions of the Contract in an amount representing a fair and reasonable fee in respect of such Work.
- 9.3 In addition to the amount which the Contractor shall be paid under section GC9.2, the Contractor shall be reimbursed for the Contractor's cost of and incidental to the cancellation of obligations incurred by the Contractor pursuant to such notice and obligations incurred by or to which the Contractor is subject with respect to the Work.
- 9.4 The Contractor shall have no claim for damages, compensation, loss of profit, allowance or otherwise by reason of or directly or indirectly arising out of any action taken or notice given by Canada under the provisions of section GC9 except as expressly provided therein.
- 9.5 Upon termination of the Contract under section GC9.1, Canada may require the Contractor to deliver and transfer title to Canada, in the manner and to the extent directed by Canada, any finished Work which has not been delivered prior to such termination and any material, goods or Work-in-progress which the Contractor specifically acquired or produced for the fulfillment of the Contract.

GC10. Termination due to Default of Contractor

- 10.1 Canada may by notice to the Contractor, terminate the whole or any part of the Contract:
- a) If the Contractor fails to perform any of the Contractor's obligations under the Contract or in Canada's view, so fails to make progress so as to endanger performance of the Contract in accordance with its terms;
 - b) To the extent permitted under law, if the Contractor becomes bankrupt or insolvent, or a receiving order is made against the Contractor, or an assignment is made for the benefit of creditors, or if an order is made or resolution passed for the winding up of the Contractor, or if the Contractor takes the benefit of a statute relating to bankrupt or insolvent debtors; or
 - c) If the Contractor makes a false declaration under GC 37 or GC 38 or fails to comply with the terms set out in GC 16.3 or GC 39.
- 10.2 Upon termination of the Contract under section GC10, the Contractor shall deliver to Canada any finished Work which has not been delivered and accepted prior to such termination, together with materials and Work-in-progress relating specifically to the Contract and all materials, texts and other documents supplied to the Contractor in relation to the Contract.
- 10.3 Subject to the deduction of any claim which Canada may have against the Contractor arising under the Contract or out of termination, payment will be made by Canada to the Contractor for the value of all finished Work delivered and accepted by Canada, such value to be determined in accordance with the rate(s) specified in the Contract, or, where no rate is specified, on a proportional basis.
- 10.4 If the contract is terminated pursuant to GC 10.1(c), in addition to any other remedies that may be available against the Contractor, the Contractor will immediately return any advance payments.

GC11. Suspension of Work

- 11.1 The Minister may at any time, by written notice, order the Contractor to suspend or stop the Work or part of the Work under the Contract. The Contractor must immediately comply with any such order in a way that minimizes the cost of doing so.

GC12. Extension of Contract

- 12.1 Where the Minister determines that additional work of the same nature as the Work described in this Contract is required, the Contractor shall do such work and where required the term of the Contract shall be extended accordingly and confirmed in writing between the parties.
- 12.2 Payment for the work described in subsection 1 shall be calculated and paid on the same basis as in section GC12 and where required prorated.
- 12.3 Where the Minister has determined that the Contractor shall be paid expenses related to the Work described in section GC12.1, the type of expenses and amounts shall be confirmed in writing between the parties.

TERMS OF PAYMENT

GC13. Method of Payment

- 13.1 Payment in the case of progress payments:
- a) Payment by Canada to the Contractor for the Work shall be made within thirty (30) days following the date on which a claim for progress payment is received according to the terms of the Contract; and
 - b) If the Minister has any objection to the form of the claim for payment or the substantiating documentation, shall, within fifteen (15) days of its receipt, notify the Contractor in writing of the nature of the objection.

13.2 Payment in the case of payment on completion:

- a) Payment by Canada to the Contractor for the Work shall be made within thirty (30) days following the date on which the Work is completed or on which a claim for payment and substantiating documentation are received according to the terms of the Contract, whichever date is the later;
- b) If the Minister has any objection to the form of the claim for payment or the substantiating documentation, shall, within fifteen (15) days of its receipt, notify the Contractor in writing of the nature of the objection.

GC14. Basis of Payment

14.1 A claim in the form of an itemized account certified by the Contractor with respect to the accuracy of its contents shall be submitted to the Minister.

14.2 Travel and other expenses, where allowed by the Contract, shall be paid in accordance with Treasury Board Guidelines and Directives, certified by the Contractor as to the accuracy of such claim.

GC15. Interest on Overdue Accounts

15.1 For the purposes of this clause:

- (a) "Average Rate" means the simple arithmetic mean of the bank rates in effect at 4:00 p.m. Eastern Standard Time each day during the calendar month which immediately precedes the calendar month in which payment is made;
- (b) "Bank rate" means the rate of interest established from time to time by the Bank of Canada as the minimum rate at which the Bank of Canada makes short term advances to members of the Canadian Payments Association;
- (c) "Date of payment" means the date of the negotiable instrument drawn by the Receiver General for Canada and given for payment of an amount due and payable;
- (d) an amount is "due and payable" when it is due and payable by Canada to the Contractor in accordance with the terms of the Contract; and
- (e) An amount becomes "overdue" when it is unpaid on the first day following the day upon which it is due and payable.

15.2 Canada shall be liable to pay to the Contractor simple interest at the Average Bank of Canada discount rate from the previous month plus 3 percent per annum on any amount that is overdue from the date such amount becomes overdue until the day prior to the date of payment, inclusive. The Contractor is not required to provide notice to Canada for interest to be payable.

15.3 Canada shall not be liable to pay interest in accordance with this clause if Canada is not responsible for the delay in paying the Contractor.

15.4 Canada shall not be liable to pay interest on overdue advance payments.

GC16. Records to be kept by Contractor

16.1 The Contractor must keep proper accounts and records of the cost of performing the Work and of all expenditures or commitments made by the Contractor in connection with the Work, including all invoices, receipts and vouchers. The Contractor must retain records, including bills of lading and other evidence of transportation or delivery, for all deliveries made under the Contract.

16.2 If the Contract includes payment for time spent by the Contractor, its employees, representatives, agents or subcontractors performing the Work, the Contractor must keep a record of the actual time spent each day by each individual performing any part of the Work.

- 16.3 Unless Canada has consented in writing to its disposal, the Contractor must retain all the information described in this section for six (6) years after it receives the final payment under the Contract, or until the settlement of all outstanding claims and disputes, whichever is later. During this time, the Contractor must make this information available for audit, inspection and examination by the representatives of Canada, who may make copies and take extracts. The Contractor must provide all reasonably required facilities for any audit and inspection and must furnish all the information as the representatives of Canada may from time to time require to perform a complete audit of the Contract.
- 16.4 The amount claimed under the Contract, calculated in accordance with the Basis of Payment provision in the Articles of Agreement, is subject to government audit both before and after payment is made. If an audit is performed after payment, the Contractor agrees to repay any overpayment immediately on demand by Canada. Canada may hold back, deduct and set off any credits owing and unpaid under this section from any money that Canada owes to the Contractor at any time (including under other Contracts). If Canada does not choose to exercise this right at any given time, Canada does not lose this right.

GC17. Invoice Submission

- 17.1 Invoices must be submitted in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
- 17.2 Invoices must show:
- (a) the date, the name and address of the client department, item or reference numbers, deliverable and/or description of the Work, contract number, Client Reference Number (CRN), Procurement Business Number (PBN), and financial code(s);
 - (b) details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
 - (c) deduction for holdback, if applicable;
 - (d) the extension of the totals, if applicable; and
 - (e) if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.
- 17.3 Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
- 17.4 By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

GC18. Right of Set off

Without restricting any right of set off given by law, the Minister may set off against any amount payable to the Contractor under the Contract, any amount payable to Canada by the Contractor under the Contract or under any other current contract. Canada may, when making a payment pursuant to the Contract, deduct from the amount payable to the Contractor any such amount payable to Canada by the Contractor which, by virtue of the right of set off, may be retained by Canada.

GC19. Assignment

- 19.1 The Contract shall not be assigned in whole or in part by the Contractor without the prior written consent of Canada and an assignment made without that consent is void and of no effect.
- 19.2 An assignment of the Contract does not relieve the Contractor from any obligation under the Contract or impose any liability upon Canada.

GC20. Subcontracting

- 20.1 The Contractor must obtain the consent in writing of the Minister before subcontracting.
- 20.2 Subcontracting does not relieve the Contractor from any of its obligations under the Contract or impose any liability upon Canada to a subcontractor.
- 20.3 In any subcontract, the Contractor will bind the subcontractor by the same conditions by which the contractor is bound under the Contract.

GC21. Indemnification

- 21.1 The Contractor shall indemnify and save harmless Canada from and against all claims, losses, damages, costs, expenses, actions and other proceedings, made, sustained, brought, prosecuted, threatened to be brought or prosecuted, in any manner based upon, occasioned by or attributable to any injury to or death of a person or damage to or loss of property arising from any willful or negligent act, omission or delay on the part of the Contractor, the Contractor's servants, subcontractors or agents in performing the Work or as a result of the Work.
- 21.2 The Contractor's liability to indemnify or reimburse Canada under the Contract shall not affect or prejudice Canada from exercising any other rights under law.

GC22. Confidentiality

The Contractor shall treat as confidential, during as well as after performance of the Work, any information to which the Contractor becomes privy as a result of acting under the Contract. The Contractor shall use its best efforts to ensure that its servants, employees, agents, subcontractors or assigned observe the same standards of confidentiality.

GC23. Indemnification - Copyright

The Contractor shall indemnify Canada from and against all costs, charges, expenses, claims, actions, suits and proceedings for the infringement or alleged infringement of any copyright resulting from the performance of the Contractor's obligations under the Contract, and in respect of the use of or disposal by Canada of anything furnished pursuant to the Contract.

GC24. Indemnification - Inventions, etc.

The Contractor shall indemnify Canada from and against all costs, charges, expenses, claims, actions, suits and proceedings for the use of the invention claimed in a patent, or infringement or alleged infringement of any patent or any registered industrial design resulting from the performance of the Contractor's obligations under the Contract, and in respect of the use of or disposal by Canada of anything furnished pursuant to the Contract.

GC25. Ownership of Copyright

- 25.1 Anything that is created or developed by the Contractor as part of the Work under the Contract in which copyright subsists belongs to Canada. The Contractor must incorporate the copyright symbol and either of the following notices, as appropriate:
- © HER MAJESTY THE QUEEN IN RIGHT OF CANADA (year)
- or
- © SA MAJESTÉ LA REINE DU CHEF DU CANADA (année).
- 25.2 At the request of the Minister, the Contractor must provide to Canada, at the completion of the Work or at such other time as the Minister may require a written permanent waiver of Moral Rights, in a form acceptable to the Minister, from every author that contributed to the Work. If the Contractor is an author, the Contractor permanently waives the Contractor's Moral Rights.

GC26. Taxes

26.1 Municipal Taxes

Municipal Taxes do not apply.

26.2 Federal government departments and agencies are required to pay Applicable Taxes.

26.3 Applicable Taxes will be paid by Canada as provided in the Invoice Submission section. It is the sole responsibility of the Contractor to charge Applicable Taxes at the correct rate in accordance with applicable legislation. The Contractor agrees to remit to appropriate tax authorities any amounts of Applicable Taxes paid or due.

26.4 The Contractor is not entitled to use Canada's exemptions from any tax, such as provincial sales taxes, unless otherwise specified by law. The Contractor must pay applicable provincial sales tax, ancillary taxes, and any commodity tax, on taxable goods or services used or consumed in the performance of the Contract (in accordance with applicable legislation), including for material incorporated into real property.

26.5 In those cases where Applicable Taxes, customs duties, and excise taxes are included in the Contract Price, the Contract Price will be adjusted to reflect any increase, or decrease, of Applicable Taxes, customs duties, and excise taxes that will have occurred between bid submission and contract award. However, there will be no adjustment for any change to increase the Contract Price if public notice of the change was given before bid submission date in sufficient detail to have permitted the Contractor to calculate the effect of the change.

26.6 Tax Withholding of 15 Percent

Pursuant to the *Income Tax Act*, 1985, c. 1 (5th Supp.) and the Income Tax Regulations, Canada must withhold 15 percent of the amount to be paid to the Contractor in respect of services provided in Canada if the Contractor is a non-resident, unless the Contractor obtains a valid waiver. The amount withheld will be held on account for the Contractor in respect to any tax liability which may be owed to Canada.

GC27. International Sanctions

27.1 Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to economic sanctions.

Details on existing sanctions can be found at: <http://www.international.gc.ca/sanctions/index.aspx?lang=eng>.

27.2 The Contractor must not supply to the Government of Canada any goods or services which are subject to economic sanctions.

27.3 The Contractor must comply with changes to the regulations imposed during the period of the Contract. The Contractor must immediately advise Canada if it is unable to perform the Work as a result of the imposition of economic sanctions against a country or person or the addition of a good or service to the list of sanctioned goods or services. If the Parties cannot agree on a work around plan, the Contract will be terminated for convenience in accordance with section GC9.

GC28. T1204 Government Service Contract Payment

28.1 Pursuant to regulations made pursuant to paragraph 221 (1)(d) of the *Income Tax Act*, payments made by departments and agencies to Contractors under applicable services Contracts (including Contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payment. To enable client departments and agencies to comply with this requirement, Contractors are required to provide information as to their legal name and status, business number, and/or Social Insurance Number or other supplier information as applicable, along with a certification as to the completeness and accuracy of the information.

GC29. Successors and Assigns

The Contract shall enure to the benefit of and be binding upon the parties hereto and their lawful heirs, executors, administrators, successors and assigns as the case may be.

GC30. Conflict of Interest and Values and Ethics Codes for the Public Service

The Contractor acknowledges that individuals who are subject to the provisions of the *Conflict of Interest Act, 2006*, c. 9, s. 2, the Conflict of Interest Code for Members of the House of Commons, any applicable federal values and ethics code or any applicable federal policy on conflict of interest and post-employment shall not derive any direct benefit resulting from the Contract unless the provision or receipt of such benefit is in compliance with such legislation and codes.

GC31. No Bribe

The Contractor declares that no bribe, gift, benefit, or other inducement has been or will be paid, given, promised or offered directly or indirectly to any official or employee of Canada or to a member of the family of such a person, with a view to influencing the entering into the Contract or the administration of the Contract.

GC32. Errors

Notwithstanding any other provision contained in this Contract, no amount shall be paid to the Contractor based on the cost of Work incurred to remedy errors or omissions for which the Contractor or his servants, agents or subcontractors are responsible, and such errors or omissions shall be remedied at the Contractor's cost, or, at the option of Canada, the Contract may be terminated and in that event the Contractor shall receive payment only as determined under section GC10.

GC33. Performance

The failure of Canada to require performance by the Contractor of any provision of this Contract shall not affect the right of Canada thereafter to enforce such provision, nor shall the waiver by Canada of any breach of any term of the Contract be taken or held to be a waiver of any further breach of the same or any other term or condition.

GC34. Gender

Whenever the singular or masculine is used throughout this Contract, it shall be construed as including the plural, feminine, or both whenever the context and/or the parties hereto so require.

GC35. Survival

All the Parties' obligations of confidentiality, representations and warranties set out in the Contract as well as any other the provisions, which by the nature of the rights or obligations might reasonably be expected to survive, will survive the expiry or termination of the Contract.

GC36. Severability

If any provision of the Contract is declared by a court of competent jurisdiction to be invalid, illegal or unenforceable, that provision will be removed from the Contract without affecting any other provision of the Contract.

GC37. Contingency Fees

The Contractor certifies that it has not, directly or indirectly, paid or agreed to pay and agrees that it will not, directly or indirectly, pay a contingency fee for the solicitation, negotiation or obtaining of the Contract to any person, other than an employee of the Contractor acting in the normal course of the employee's duties. In this section, "contingency fee" means any payment or other compensation that depends or is calculated based on a degree of success in soliciting, negotiating or obtaining the Contract and "person" includes any individual who is required to file a return with the registrar pursuant to section 5 of the *Lobbying Act, 1985*, c. 44 (4th Supplement).

GC38. Criminal Offense

The Contractor declares that the contractor has not been convicted of an offence, other than an offence for which a pardon has been granted, under section 121, 124 or 418 of the Criminal Code.

GC39. Public Disclosure

- 39.1 The Contractor consents, in the case of a contract that has a value in excess of \$10,000, to the public disclosure of basic information - other than information described in any of paragraphs 20(1)(a) to (d) of the *Access to Information Act* - relating to the contract.
- 39.2 The contractor consents, in the case of a contract with a former public servant in receipt of a Public Servant Superannuation (PSSA) pension, that the contractor'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 described in 39.1.

GC40. Notice

Any notice under the Contract must be in writing and may be delivered by hand, courier, mail, facsimile or other electronic method that provides a paper record of the text of the notice. It must be sent to the Party for whom it is intended at the address stated in the Contract. Any notice will be effective on the day it is received at that address. Any notice to Canada must be delivered to the Minister.

GC41. Accuracy

The Contractor represents and warrants that the information submitted with its bid is accurate and complete. The Contractor acknowledges that the Minister has relied upon such information in entering into this Contract. This information may be verified in such manner as the Minister may reasonably require.

GC42. Dispute Resolution Services

The parties understand that the Procurement Ombudsman appointed pursuant to subsection 22.1 (1) of the *Department of Public Works and Government Services Act* will, on request of a party, provide a proposal for an alternative dispute resolution process to resolve any dispute arising between the parties respecting the interpretation or application of a term or condition of this contract. The parties may consent to participate in the proposed alternative dispute resolution process and to bear the cost of such process. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by email at boa.opo@boa.opo.gc.ca.

GC43. Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (1) of the *Department of Public Works and Government Services Act* will review a complaint filed by the contractor respecting administration of this contract if the requirements of Subsection 22.2 (1) of the *Department of Public Works and Government Services Act* and Section 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by email at boa.opo@boa.opo.gc.ca.

GC44. Entire Agreement

The Contract constitutes the entire agreement between the Parties relative to the subject procurement and supersedes all previous negotiations, communications and other agreements, whether written or oral, unless they are incorporated by reference in the Contract. There are no terms, covenants, representations, statements or conditions relative to the subject procurement binding on the Parties other than those contained in the Contract.



APPENDIX B

STATEMENT OF WORK

1.0. GENERAL INFORMATION FOR CONTRACTOR

1.1. Organization of Specification

This specification contains three sections. Section 1 provides general information for the Contractor. Section 2 lists the scope of work. Section 3 specifies the standards of workmanship and the site specific requirements to be followed.

1.2. Background

Agriculture & Agri-Food Canada (AAFC) operates a large agricultural research laboratory with attached greenhouses, central heating and cooling plant and support buildings at its Harrow Research and Development Centre (HRDC), 2585 County Road 20, in Harrow, Ontario. The laboratory building and central heating and cooling plant were built in 1968. Some of the greenhouses and out buildings pre-date the existing laboratory building whereas others are less than 5 years old. A large Delta Building Management System (DBMS) is used to monitor and control buildings, central power plant equipment, power generation equipment, controlled environment chambers, cold storage rooms and greenhouse compartments.

1.3. General Requirement

One (1) experienced Contractor employing certified skilled labour and having extensive experience in the installation, repair and maintenance of Delta Building Management Systems (DBMS). To supply, install, calibrate, maintain and provide emergency repair services for a large DBMS, on a time and materials (standing offer) basis. Supply consumable materials, DBMS compatible Delta Controls replacement components, system expansions for new equipment, graphics design, system programming. The Contractor will also maintain one line electronic drawings of the facility showing the location and identification of all panels complete with a description of points associated with each panel. To supply all factory trained technicians, tools, testing and calibration equipment, ladders, safety equipment and transportation to fulfil the scope of work

All work will be carried out by the successful Contractors full time staff, sub-contracting other firms to carry out any part of the work is not acceptable.

AAFC will have the option of supplying system components for replacement or expansions.

1.4. Coordination of Work

All work is to be coordinated with the Facility Manager or his/her representative. The successful Contractor will not be required to supply on site supervision for their staff working on the site.

All Delta Certified Control Technicians, programmers, graphic designers and licensed 309A electricians assigned to perform any work will be experienced in type of work required at this site. Under the terms of the Standing Offer, Agriculture & Agri-Food Canada will not pay for any travel time or supervisors that visit the site for any reason.

1.5 Procedures for Call Up Against Standing Offer

Service calls being unpredictable, will be performed on an as and when requested basis, call in requests will only be made by the Facility Manager or his/her representative. The Contractor to must provide contact telephone numbers for after hours, weekend and holiday Service Calls.



When maintenance or repair work is required, the Contractor shall meet with the Facility Manager or his/her representative at his request to discuss and define the scope of work within three (3) days of his request. The Contractor shall provide an estimate to complete the work if requested by the Facility Manager or his/her representative. Based on the estimate provided, a call up against the standing offer will be made by the Research Centre on a standard numbered form. The Contractor shall not proceed or incur expenses on a job until a written call up is received for the work.

To allow budget control, the Contractor will periodically price quotations for the Facility Manager or his/her representative as requested for various jobs at a firm price.

1.6 Procedures on Site

The Contractor must be prepared to start work within two days from receipt of a call up against a standing offer. Each day the Contractor works on site, workers shall report to the Facility Manager or his/her representative so that he is aware of their presence on site and the area of the building in which they will be working.

1.7 Security and Vehicle Parking

Photo identification is required for all employees of the Research Centre and all Contractors staff who frequent the site. All employees of the Contractor will be required to pass a Federal Government Security Clearance screening as directed by the Contracting Authority.

Therefore, all employees of the Contractor upon passing the Federal Government Security Clearance screening requirements will be issued a photo identification card which includes reader door access. All photo identification must be worn at all times and clearly visible to AAFC Employees.

The employees of the Contractor assigned to work at this AAFC Research Site will never allow access to persons requesting entry into the Facility from the outside. The Contractors employees will immediately notify the Facility Manager or his/her representative.

Space for parking of vehicles and storage of materials and equipment on site will to be arranged with the Facility Manager or his/her representative.

Specific Federal Security requirements will be outlined by the Contracting Authority.

1.8 Service Interruptions

Any shut down of services required for maintenance or repair work must be planned with the Facility Manager or his/her representative well in advance to allow adequate time to advise research staff and to minimize disruptions and damage or loss of ongoing research projects.

1.9 Health and Safety Meeting

At all times the Contractor's on site representatives will observe all Health and Safety regulations while working on the site. As required, a meeting will be arranged to discuss Health and Safety related concerns with the Facility Manager or his/her representative. All safety equipment for the Contractors employees required to undertake the work must be provided by the Contractor and must be used by the employees.

1.10 Hours of Work

In general, all work shall be carried out between 7:00 AM to 4:30 PM Monday through Friday. However, in circumstances where it is deemed necessary by the Facility Manager or his/her representative to work on equipment outside regular working hours, work outside of regular working hours will be authorized.



We have determined that the majority of work can be carried out during regular working hours, Monday to Friday.

1.11 Time and Materials Records - Daily and Per Job

All daily work associated with this DBMS Repair and Maintenance Standing Offer will be recorded on a time and material sheet supplied by the Contractor. All time and material sheets will be signed by the Facility Manager or his/her representative and one (1), copy will be given to him/her. Each new job will be assigned a new job number and invoicing will take place at the completion of the work. A copy of the time and material sheets will accompany the Contractors invoice, pricing as per the rates included in Appendix C of the Standing Offer.

The Contractor must keep accurate records of hours worked and materials used for billing purposes, this will be accomplished by the use of numbered time and materials sheet supplied by the Contractor. Invoices must provide a detailed breakdown of hours worked by each technician and the materials used on each job, copies of the job sheets will accompany each invoice. The Facility Manager or his/her representative will authorize daily time sheets by signature only at the close of each day. The Facility Manager or his/her representative may request at any time, a copy of the Contractors invoice from a supplier showing prices charged to the Contractor for materials and supplies being marked-up and charged to Agriculture & Agri-Food Canada as a result of this Standing Offer Agreement.

The Contractors invoices must include the cost for all labour, materials, equipment, travel, commissioning services and disposal of used materials, plus HST, as per the call-up issued to the Contractor and the rates included in Appendix C of the Standing Offer.

1.12 Tools

The Contractor must supply all tools and test equipment required to carry out the work. Use of onsite maintenance tools, safety equipment or supplies will not be permitted.

1.13 Electric Power

Electric power required for operation of hand tools will be supplied by the Research Centre. The Contractor will be responsible for making connections for power tools to the Research Centres electrical systems in accordance with the requirements of the Canadian Electrical and Safety Code. If electrical connections are required inside electrical distribution panels this connection will be done by a licenced 309A Construction Maintenance Electrician.

All electrical work associated with maintaining or connecting new equipment onto the existing DBMS will be carried out by a licenced 309A Construction Maintenance Electrician.

1.14 Drawings and Documentation

Drawings and Manufacturers literature in hard copy or electronic format for facility systems and equipment will be provided where possible to the Contractor on an as and when needed basis, consult with Facility Manager or his/her representative.

The Contractor will turn over to the Facility Manager or his/her representative any manufacturer's technical literature associated with equipment supplied and installed under this Standing Offer. This will include operating instructions, replacement parts lists, drawings, calibration instructions and Warranty Documentation.

1.15 Removal of Surplus Materials from the Site

Surplus materials are not to be removed from the site without prior approval of the Facility Manager or his/her representative. Recycle bins are available on site, materials such as metals, cardboard, glass,



plastics, fine paper and construction materials must be recycled from this site, these bins are to be used by the Contractors staff consult with Facility Manager or his/her representative.

Other recycle containers are located inside the facility for the recycling of lamps and electrical/electronic equipment.

Reclaim, reuse and recycle refrigerants and refrigeration oil products to meet Agriculture & Agri-Food Canada and Environment Canada Regulations.

Burning or land filling of waste materials is forbidden on this site.

1.16 Warranty

The Contractor will outline their warranty policy for Delta Original Equipment Manufactured replacement parts and labour.

1.17 Permits, Fees and Codes

1.17.1 It is the responsibility of the Contractor to obtain all required permits, pay all fees and adhere to all applicable codes and regulations affecting the work. As and when required, the Contractor will be responsible for arranging and obtaining electrical inspections from Hydro 1 Safety Authority. Any deficiencies found by the Hydro 1 Safety Authority which can be attributed to the Contractors failure to follow the electrical code must be rectified at no additional cost to the Research Centre. The cost of the permit shall be charged back on a separate line item on the billing invoice.

1.17.2 When and as required, "Special Inspection" for electrical/electronic equipment or components by Hydro 1 - "Electrical Safety Authority" will be arranged and paid for by the Contractor.

1.17.3 As a minimum, when performing work at this site follow applicable codes, acts and regulations, a limited list follows, others will apply:

- (NFC) National Fire Code 2010
- (NBC) National Building Code 2010
- (CEC) Canadian Electrical and Safety Code
- (TSSA) Technical Standards and Safety Authority
- (CSA) Canadian Standards Association

2.0. SCOPE OF WORK

2.1 Existing Monitored and Controlled Equipment

The extent of work to be performed during the course of this Regional Individual Standing Offer will be determined by the availability of funds, legislative and preventative maintenance requirements, equipment failures and Science Program priorities. The scope of work will be defined by the Facility Manager or his/her representative at the time of each call up against the Regional Individual Standing Offer.

The Contractor must be capable of providing onsite technical support for troubleshooting and repairs within one (1), hour for all equipment listed in this specification.

Provide emergency break down service for all listed equipment 24 hours per day, 365 days per year call in by the Facility Manager or his/her representative. A general description of the equipment being controlled and monitored by the existing Delta Building Management System (DBMS) and found at the Harrow Research and Development Centre (HRDC) follows:



Equipment listed is monitored, controlled and alarmed by the existing DBMS. Computers are located within the facility and also reside at remote locations for monitoring, receiving alarms and making changes to equipment set points or resetting.

Message alarm signals are sent to computers, cellular phones and black berry units.

- 2.1.1** Controlled Environment Chambers: Multiple sizes, capacities and manufacturers used for growth and study of plant materials and insects. Chambers offer a variety of settings to vary temperature, light levels, carbon dioxide enrichment, additive humidification and de-humidification.
- 2.1.2** Incubators: Are constant temperature cabinets, some are equipped with lights and humidification systems. Incubators found throughout the facility are used for growing cultures.
- 2.1.3** Ultra Low Temperature Freezers: Horizontal and Vertical configurations, freezers are found throughout the facility and laboratories.
- 2.1.4** Cold Storage Rooms: Vary in size and capacity, located throughout the facility and in our buildings, all systems are water cooled.
- 2.1.5** Freezer Rooms: Vary in size and capacity, located throughout the facility, all are water cooled.
- 2.1.6** Germination Room: Refrigerated enclosure, high humidity with or without lighting systems used to propagate seeds.
- 2.1.7** Humidification Rooms: Refrigerated enclosures, high humidity and stronger growth lighting used to maintain larger plants
- 2.1.8** Central Heating and Cooling Plant Equipment: Such as, steam boilers, deaerator, centrifugal water chillers, cooling towers, fans, pumps, variable speed controllers, air compressors, vacuum pumps, two (2) diesel generator sets and electrical switch gear.
- 2.1.9** Roof Top Air Handling Units: Natural Gas fired roof top air handling units complete with 2 stage cooling.
- 2.1.10** Gas Fired Equipment: Such as crop dryers, domestic hot water heating boilers, furnaces, hot water heating boilers and air conditioning units associated with outbuildings.
- 2.1.11** Steam Generators: Used for spot steam generation, three units in service at the facility.
- 2.1.12** Main Air Handling Systems: Building 84, steam coils, chilled water coils, humidification, make up air, face and bypass dampers and coils.
- 2.1.13** Main Facility: Control and monitoring of office and laboratory space temperatures and humidity.
- 2.1.14** Perimeter Heat: Control and monitoring of hydronic heating systems.
- 2.1.15** Long Term Soil Storage: Heat pump units, building 55 and 73 long term soil archives.
- 2.1.16** Greenhouse Compartments: Greenhouse 092 and associated outdoor weather station equipment, presently monitoring and control for two individual greenhouse compartments.
- 2.1.17** Chemical Building - Weil/McLean hot water natural gas fired boiler with glycol loop feeding roof top air handling system and inside building temperatures.



- 2.1.18 Tank Levels: Monitor and alarm various tank levels throughout the Main Facility and for Individual waste water storage tanks associated with outbuildings.
- 2.1.19 Main Weather Station: Service, repair and calibrate (DBMS) weather station equipment.
- 2.1.20 Lighting Systems: Control interior and exterior facility lighting systems.
- 2.1.21 Irrigation Systems: Farm irrigation and lawn irrigation systems.
- 2.1.22 Maintain existing Historian Program data collection and storage system.
- 2.1.23 Maintain existing desk top and laptop computers and operating systems, update graphics.
- 2.1.24 Maintain existing interfaces with other operating systems such as Cummins Diesel Generator System, McQuay Centrifugal Chiller Systems, Cleaver Brooks Boiler Systems, Argus Greenhouse Systems and Priva Integro Greenhouse Systems.
- 2.1.25 Computers and Operating Software: The Contractor will maintain desk top and lap top computers and (DBMS) operating software systems. Update (DBMS) software as required.
- 2.1.26 New Equipment: The Contractor must be prepared to offer solutions and technical expertise to connect new and existing equipment to the Delta Building Management System operating at this Facility.
- 2.1.27 Commissioning: The Contractor will upon connection of new equipment or repairs to equipment presently connected to the Building Management System fully test the new Controls. Consult with the Facility Manager or his/her representative.
- 2.1.28 Note: The above mentioned equipment and systems cannot be considered a complete list of all equipment and systems either directly connected to or interfacing with the existing Delta Building Management System operating at this Facility.

2.1.29 Excluded Systems

Other Monitoring and Control Systems are in use at the HRDC and will not be included under the SO; they are identified below:

- Priva Greenhouse Monitoring and Control System.
- Argus Greenhouse Monitoring and Control System.
- Chubb Security System
- IFC 3030 Fire Alarm System.
- Cummins Diesel Generator Control System.

3.0 WORKMANSHIP AND SITE SPECIFIC REQUIREMENTS

3.1 General

In general all Control Work and System testing must be performed in accordance with current acts, codes, regulations and best practices both Federal or Provincial regulations may apply.

All work to be carried out by skilled workers/trades/technicians and professionals, work to be performed in a timely, professional manner, this also means keeping areas where the work is performed clean, tidy and safe.

The existing Delta Building Management System, software and hardware found at this facility has been well maintained, calibrated and updated on a regular basis. New equipment is



purchased as funding becomes available for Science Related Projects and Facility Operations, critical equipment that requires monitoring and control will be added to the existing Delta Building Management System on an as and when needed basis.

3.2 Site Safety

The Contractor will ensure that all work is carried out in a safe manner and that all their employees respect all applicable safety and health regulations. The Contractor will ensure that any employee on site representing their firm is equipped with and uses all necessary safety equipment at all times.

The Contractor will provide their employees with personal protective equipment (PPE), ensure that they wear it and post off any dangerous areas. Examples of such equipment are safety goggles, breathing apparatus, gloves, safety shoes, hard hats, fall arrest harnesses, coveralls, non-conductive ladders and approved scaffolds with safety rails.

This is only a partial list, in any case follow applicable safety rules and regulations while on the site.

The Contractors employees will erect safety barriers, safety signage, caution tapes or other means of protecting the work site and notifying others of potential dangers.

The Contractors employees are to maintain a clean work site. Always clean up the site before leaving, never leave fluids, grease or standing water on floors as this may cause a slip and fall incident.

Practice lock out and tag out procedures for electrical and natural gas fired equipment and notify the Facility Manager or his/her representative.

Neatly and professionally label all Delta Panels, Electrical Panels and Breakers for safety and Future reference.

All employees of the Contractor working on the site will be required to complete a "Workplace Hazardous Material Information System" training session. This will be arranged by the Facility Manager or his/her representative.

3.3 Technical Authority Inspections:

The Contractor will arrange for and pay for all necessary inspections and permits if applicable to complete the work as outlined herein. When and as required, Inspections by Technical Authorities will be the responsibility of the Contractor. The Contractor will only supply and install electrical/electronic components that are (CSA) approved and compatible with existing equipment, special inspections by Hydro 1 Special Inspection Authority will be arranged by the Contractor.

3.4 Replacement Parts:

The Contractor will only supply and install Original Equipment Manufacturer (OEM) Delta replacement parts when maintaining equipment at this Facility. When substitution of replacement parts is required notify and get approval from the Facility Manager or his/her representative before proceeding with or installing non OEM replacement components.

3.5 Electrical/Electronic Components:

Electrical/Electronic Components: The Contractor will only supply and install electrical and electronic components approved for installation and use in the Province of Ontario. Refer to the



Canadian Electrical and Safety Code, Canada Safety Authority, Underwriters Laboratories Canada and or Hydro 1 Special Inspection Authority.

3.6 Starting and Stopping of Equipment Disruption of Services

The Contractors employees are not allowed to stop or start any equipment associated with the operation of the Research Centre, contact the Facility Manager or his/her representative before stopping or starting equipment to protect Research Projects.

When service interruptions are required, for example water supplies, electrical supplies, compressed air, natural gas notify the Facility Manager or his/her representative.

Never disconnect, disable or alter any life safety system or component. Security, Fire and Emergency Power Systems are maintained and tested under other existing Service Contracts.

3.7 Reporting Conditions

Contractor employees will report any damage, dangerous conditions or security issues that exist within the work area, report this information to the Facility Manager or his/her representative and stop all work until the situation is rectified.

3.8 Facility Doors

The Contractors employees or upon leaving the site at the end of a day, will never leave doors in an open or unlocked position. Never chain closed or block a fire egress door, consult with the site Facility Manager or his/her representative.

3.9 Warranty and Equipment Technical Literature

The Contractor will furnish to AAFC all warranty documents concerning warranty guarantee's for workmanship, parts and labour. Documents must specify period and type of guarantee. Supply to the Facility Manager or his/her representative all technical literature and maintenance instructions supplied by the factory for new equipment this information will be kept on file for future reference.

3.10 Equipment Commissioning

The Contractor will ensure that all control systems and system components are tested and that each system is fully commissioned upon completion of the work. Commissioning will be supervised by the Facility Manager or his/her representative.

3.11 Miscellaneous Hardware

All miscellaneous hardware items not specified in this document but are required to make up a fully operational system shall be provided and installed by the Contractor.

3.12 Reporting and Security

The Contractors employees must report to the Facility Manager or his/her representative each day before starting work. Employees are to follow site specific security rules and regulations which include signing in and out of the Facility. Employees of the Contractor will also be required to complete a security screening form before working on the site. Employees who fail to meet Federal requirements for the security screening will not be allowed on the site.



3.13 Safety

Contractors employees will follow all applicable Provincial, Municipal and Federal Health and Safety rules and regulations such as Canada Labour Code Part II. Provide a safety and fire emergency plan for reference when and if requested by the Facility Manager or his/her representative.

3.14 Parts, Materials and System Components

All parts, materials and replacement components supplied and installed as part of this standing offer agreement will be new Delta (OEM) components used materials are not acceptable.

3.15 Site Measurements

All site, equipment and structural measurements are the responsibility of the Contractor.

3.16 Damage to Property or Equipment

Any damage to Federal property or equipment by the Contractors employees will be the responsibility of the Contractor.

3.17 Parts and Material Deliveries

The Contractor will be responsible for off- loading all materials associated with their work. AAFC equipment and personnel will not handle Contractors material delivered to the site.

The Contractor will sign for all materials that are delivered to the site and associated with their work, AAFC employees are not authorized to sign for materials delivered to Contractors.

3.18 Agriculture and Agri-Food Canada Equipment and Vehicles

The Contractor's employees will not use or move Federal Government motor vehicles or motorized equipment at anytime, notify the Facility Manager or his/her representative.

3.19 Storage of Materials on Site

When parts are required for larger jobs and need to be stored on the site, arrangements will be made with the Facility Manager or his/her representative. Agriculture Canada will in no way be responsible for any loss of tools or stored materials on the site.

3.20 Liability Insurance

Throughout the duration of the Standing Offer Agreement, maintain current liability insurance in force at all times. Provide liability insurance documents to the Contracting Authority upon request.

3.21 Facility Fire Monitoring and Alarm System

The Contractor and their employees will under no circumstances adjust, disconnect or alter in any way a Fire Safety System or Life Safety System in operation at the Research Centre. Any person working on such systems will hold a current licence in the Province of Ontario to work on Fire Safety Systems.

Contractors employees will notify the Facility Manager or his/her representative before working near a Fire System heat or smoke detection device



3.22 Label Panels and Components

The Contractor will ensure that all new control panels, load panels, electrical breakers and disconnects are neatly labelled for safety and operational purposes.

3.23 Halocarbon Management Programs

All Contractors and their employees must follow Halocarbon Management, mandatory requirements set out by Agriculture and Agri-Food Canada and Environment Canada when working on any piece of refrigeration equipment.

3.24 Designated Substances

A report outlining known Designated Substances found at Harrow and Woodslee is available on site, this list is available to the Contractor at anytime.

3.25 Co-Operation with Others

Occasionally, the Contractor will be required to work in conjunction with other Contracting Firms that provide specific expertise to a project or equipment installation. All Contractors working on this site must co-operate with each other, AAFC Staff and other Federal Government Department Representatives associated with this site. All conflicts must be reported to the Facility Manager or his/her representative immediately.



APPENDIX C

BASIS OF PAYMENT

1.0 General

Payment shall be in accordance with **article 5.0 of Call-ups clauses, Method of Payment and article 6.0 of Call-ups clauses, Direct Deposit.**

All deliverables FOB destination, Canadian custom duties and excise tax (if applicable). If applicable, Applicable Taxes for the labour will be shown separately.

2.0 Pricing Basis

The Contractor shall be paid in accordance with the basis for work as followed performed under the Call-up against a Standing Offer.



APPENDIX "C"
BASIS OF PAYMENT - Part A
Rates Offered for the Duration of the Standing Offer

I t e m #	Skilled Trades and Site Services	U of I	Year I (First year from the date of award of the SO)			Optional Year I (From the optional 3 year period- second year from the date of award of the SO)			Optional Year II (From the optional 3 year period- third year from the date of award of the SO)			Optional Year III (From the optional 3 year period- fourth year from the date of award of the SO)		
			During Regular Working Hours \$	Outside Regular Working Hours \$	Saturday, Sunday & Holidays Hours \$	During Regular Working Hours \$	Outside Regular Working Hours \$	Saturday, Sunday & Holidays Hours \$	During Regular Working Hours \$	Outside Regular Working Hours \$	Saturday, Sunday & Holidays Hours \$	During Regular Working Hours \$	Outside Regular Working Hours \$	Saturday, Sunday & Holidays Hours \$
1	Journeyman Electrician 309A Construction/Maintenance	hr												
2	DBMS Technician specialized in repair and maintenance of large DBMS	hr												
3	System Programming Technician	hr												
4	Graphics/Design Technician	hr												
5	Travel Charge Truck and Technician Round Trip	trip												
6	Mark up % Rate on Materials	%												

Name of Offeror: _____

Name of Authorized Signatory: _____

Address of Offeror: _____

Position of Signatory: _____

Signature : _____

Date: _____



APPENDIX "C"
BASIS OF PAYMENT - Part B
Financial Evaluation of Offered Rates
Year I – First year from the date of award of the SO

Item #	Skilled Trades and Site Services	U of I	During Regular Working Hours \$	Est Qty per year	Total A	Outside Regular Working Hours \$	Est Qty per year	Total B	Saturday, Sunday & Holidays Hours \$	Est Qty per year	Total C	Total per Trade / Service (Total A + B + C)
1	Journeyman Electrician 309A Construction/Maintenance	hr		x 160	=		x 10	=		x 10	=	
2	DBMS Technician specialized in repair and maintenance of large DBMS	hr		x 1040	=		x 100	=		x 45	=	
3	System Programming Technician	hr		x 15	=							
4	Graphics/Design Technician	hr		x 30	=							
5	Travel Charge Truck and Technician Round Trip	trip		x 165	=		x 36	=		x 18	=	
6	Mark up % Rate on Materials	%		x 15000	=							
TOTAL FOR YEAR I												



APPENDIX "C"
BASIS OF PAYMENT - Part B
Financial Evaluation of Offered Rates
Optional Year I – from the optional 3 year period – second year from the date of award of the SO

Item #	Skilled Trades and Site Services	U of I	During Regular Working Hours \$	Est Qty per year	Total A	Outside Regular Working Hours \$	Est Qty per year	Total B	Saturday, Sunday & Holidays Hours \$	Est Qty per year	Total C	Total per Trade / Service (Total A + B + C)
1	Journeyman Electrician 309A Construction/Maintenance	hr		x 160	=		x 10	=		x 10	=	
2	DBMS Technician specialized in repair and maintenance of large DBMS	hr		x 1040	=		x 100	=		x 45	=	
3	System Programming Technician	hr		x 15	=							
4	Graphics/Design Technician	hr		x 30	=							
5	Travel Charge Truck and Technician Round Trip	trip		x 165	=		x 36	=		x 18	=	
6	Mark up % Rate on Materials	%		x 15000	=							
TOTAL FOR OPTIONAL YEAR I												



APPENDIX "C"
BASIS OF PAYMENT - Part B
Financial Evaluation of Offered Rates
Optional Year II – from the optional 3 year period- third year from the date of award of the SO

Item #	Skilled Trades and Site Services	U of I	During Regular Working Hours \$	Est Qty per year	Total A	Outside Regular Working Hours \$	Est Qty per year	Total B	Saturday, Sunday & Holidays Hours \$	Est Qty per year	Total C	Total per Trade / Service (Total A + B + C)
1	Journeyman Electrician 309A Construction/Maintenance	hr		x 160	=		x 10	=		x 10	=	
2	DBMS Technician specialized in repair and maintenance of large DBMS	hr		x 1040	=		x 100	=		x 45	=	
3	System Programming Technician	hr		x 15	=							
4	Graphics/Design Technician	hr		x 30	=							
5	Travel Charge Truck and Technician Round Trip	trip		x 165	=		x 36	=		x 18	=	
6	Mark up % Rate on Materials	%		x 15000	=							
TOTAL FOR OPTIONAL YEAR II												



APPENDIX D

EVALUATION PROCEDURES & CRITERIA

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 AAFC will evaluate the offers.
- (c) Offers must comply with all the mandatory requirements of the RFSO and more specifically the ones described in section 2 below. If compliance to one of the mandatory requirements is not demonstrated, the proposal will be automatically rejected and the financial proposal will be returned unopened to the Offeror.

Where the words must, shall or will appear in this RFSO, the clause is to be considered as a mandatory requirement.

2. Technical Evaluation

a) Proposed Personnel:

All interested bidders must identify the following personnel in their bid, as a minimum, that would be sent to the site to perform any part of the scope of work,:

- one qualified journeyman 309A construction maintenance electrician, currently in their employ, to work on high voltage systems or when providing electrical services to power supplies associated with the Delta Building Management System (DBMS);
- one DBMS technician, specialized in the repair and maintenance of large DBMS ;
- one System Programming technician for programming, program writing, software problem solving and repair ;
- one Graphics/Design Technician.

All personnel proposed must be Delta Factory Certified and have a minimum of five (5) years experience working in their respective field of expertise on large Delta Systems as found at this Research Centre. All work will be carried out by the successful Bidder's staff, subcontracting other Contracting firms to carry out any part of the work is not acceptable.

The Journeyman 309A Construction Electrician assigned to work at the Research Centre must be currently licenced as either "Province of Ontario" or "Interprovincial".

Bidders shall provide details of these employees experience servicing and repairing large Delta Systems as outlined in Appendix B. Detailed resumes for each person proposed, stating the individual's education, work history and other relevant details, which clearly indicate that the individual meets the qualifications identified in the present section 2, including :

- Employee's full name;



- Proof of Delta Factory Training Certification;
- Other Current Ontario Certificate of Qualification Documents held by the employee;
- For the Journeyman Electrician and the DBMS technician: years of experience repairing, maintaining and or installing Delta Building Management Systems
- For the Graphics/Design technician: years of experience, type of experience and training related to DBMS;
- For the Programming technician: years of experience, type of experience and training in program writing, software problems and repair, knowledge of operating systems, related to DBMS.

Failure to provide sufficient details may result in the offer being evaluated as non-responsive.

3. Financial Evaluation

A financial evaluation of the rates proposed by the Offeror (in Part A of Appendix C) will be performed as per Part B of Appendix C. The rates submitted in the offer shall be in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded FOB destination, Canadian custom duties and excise taxes included.

4. Basis of Selection

An offer must comply with the requirements of the Request for Standing Offers to be declared responsive. The responsive offer with the total (Price for first year plus the optional years) lowest evaluated price will be recommended for issuance of a standing offer.



APPENDIX E

CERTIFICATION REQUIREMENTS

The following certification requirements apply to this Request for Standing Offer (RFSO) document. Bidders should include, with their proposal, a signed copy of this certification below.

A) LEGAL ENTITY AND CORPORATE NAME

Please certify that the Bidder is a legal entity that can be bound by the Standing Offer and sued in court and indicate **i)** whether the Bidder is a corporation, partnership or sole proprietorship, **ii)** the laws under which the Bidder was registered or formed, **iii)** together with the registered or corporate name. Also identify **iv)** the country where the controlling interest/ownership (name if applicable) of the Bidder is located.

- i) _____
- ii) _____
- iii) _____
- iv) _____

Any resulting Contract may be executed under the following:

Corporate full legal name: _____
 Place of business (complete address): _____
 Contact person: _____
 Phone: _____
 Email: _____
 GST number: _____

Name

Signature

Date

B) EDUCATION/EXPERIENCE CERTIFICATION

We certify that all statements made with regard to the education and the experience of individuals proposed for completing the subject Work are accurate and factual, and we are aware that the Minister reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared **non-responsive** or in other action which the Minister may consider appropriate.

Name



Signature

Date

C) PRICE/RATE CERTIFICATION

"We hereby certify that the price quoted have been computed in accordance with generally accepted accounting principles applicable to all like services rendered and sold by us, that such prices are not in excess of the lowest prices charged anyone else, including our most favoured customer for like quality and quantity so the services, does not include an element of profit on the sale in excess of that normally obtained by us on the sale of services of like quality and quantity, and does not include any provision for discounts or commissions to selling agents".

Name

Signature

Date

D) VALIDITY OF PROPOSAL

It is requested that proposals submitted in response to this Request for Standing Offer be:

- valid in all aspects, including price, for not less than one hundred and twenty (120) days from the closing date of this RFSO; and,
- signed by an authorized representative of the Bidder in the space provided on the RFSO; and,
- provide the name and telephone number of a representative who may be contacted for clarification or other matters relating to the Bidder's proposal.

Name

Signature

Date

E) AVAILABILITY AND STATUS OF PERSONNEL

The Bidder certifies that, should it be authorized to provide services under any Standing Offer resulting from this RFSO, the employees proposed in its proposal will be available to commence performance of the work within a reasonable time from Standing Offer award, or within the time specified herein.



If the Bidder has proposed any person in fulfilment of this requirement who is not an employee of the Bidder, the Bidder hereby certifies that it has written permission from such person to propose the services of such person in relation to the work to be performed in fulfilment of this requirement and to submit such person's résumé to the Contracting Authority.

During the proposal evaluation, the Bidder MUST upon the request of the Contracting Authority provide a copy of such written permission, in relation to any or all non-employees proposed. The Bidder agrees that failure to comply with such a request may lead to disqualification of the Bidder's proposal from further consideration.

Name

Signature

Date

F) FORMER PUBLIC SERVANT – STATUS AND DISLCOSURE

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

Definitions

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

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

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

"pension" means, a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c.C-17, the Defence Services Pension Continuation Act, 1970, c.D-3, the Royal Canadian Mounted Police Pension



Continuation Act , 1970, c.R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c.R-11, the Members of Parliament Retiring Allowances Act , R.S., 1985, c.M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? Yes

() No ()

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

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

By providing this information, Bidders agree that the successful Bidder’s status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure report.

Work Force Reduction Program

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

If so, the Bidder must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

Name

Signature

Date

G) JOINT VENTURES

- 1.0 In the event of a proposal submitted by a contractual joint venture, the proposal shall be signed by either all members of the joint venture or a statement shall be provided



to the effect that the signatory represents all parties of the joint venture. The following will be completed if applicable:

1. The Bidder represents that the bidding entity is/is not (delete as applicable) a joint venture in accordance with the definition in paragraph 3.
2. A Bidder that is a joint venture represents the following additional information:
 - (a) Type of joint venture (mark applicable choice):
 - Incorporated joint venture
 - Limited partnership joint venture
 - Partnership joint venture
 - Contractual joint venture
 - Other
 - (b) Composition (names and addresses of all members of the joint venture)
3. Definition of joint venture

A joint venture is an association of two or more parties who combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise. Joint ventures may be carried on in a variety of legal forms divided into three categories:

 - (a) The incorporated joint venture;
 - (b) The partnership venture;
 - (c) The contractual joint venture where the parties combine their resources in the furtherance of a single business enterprise without actual partnership or corporate designation.
4. The joint venture team arrangement is to be distinguished from other types of Contractor arrangements, such as:
 - (a) Prime Contractor, in which, for example, the purchasing agency contracts directly with a Contractor (prime) who acts as the system assembler and integrator, with major components, assemblies and subsystems normally subcontracted;
 - (b) Associated Contractor, in which for example, the purchasing agency contracts directly with each of the major component suppliers and performs the integration tasks or awards a separate contract for this purpose.
5. If the Standing Offer is awarded to an unincorporated joint venture, all members of the joint venture shall be jointly and severally responsible for the performance of the Call-ups against a Standing Offer.

Name



Signature

Date

H) FEDERAL CONTRACTORS PROGRAM

Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder 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 Human Resources and Skills Development Canada - Labour's website.

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.



PERSONNEL SCREENING, CONSENT AND AUTHORIZATION FORM

OFFICE USE ONLY		
Reference number	Department/Organization number	File number

NOTE: For Privacy Act Statement refer to Section C of this form and for completion instructions refer to attached instructions. Please typewrite or print in block letters.

A ADMINISTRATIVE INFORMATION (To be completed by the Authorized Departmental/Agency/Organizational Official)

New
 Update
 Upgrade
 Transfer
 Supplemental
 Re-activation

The requested level of reliability/security check(s)

Reliability Status
 Level I (CONFIDENTIAL)
 Level II (SECRET)
 Level III (TOP SECRET)

Other _____

PARTICULARS OF APPOINTMENT/ASSIGNMENT/CONTRACT

Indeterminate
 Term
 Contract
 Industry
 Other (specify secondment, assignment, etc.) _____

Justification for security screening requirement

Position/Competition/Contract number	Title	Group/Level (Rank if applicable)	
Employee ID number/PRI/Rank and Service number (if applicable)	If term or contract, indicate duration period ▶	From	To
Name and address of department / organization / agency	Name of official	Telephone number ()	Facsimile number ()

B BIOGRAPHICAL INFORMATION (To be completed by the applicant)

Surname (Last name) _____ Full given names (no initials) underline or circle usual name used _____ Family name at birth _____

All other names used (i.e. Nickname) _____

Sex: Male Female

Date of birth: Y | M | D Country of birth _____ Date of entry into Canada if born outside Canada: Y | M | D

RESIDENCE (provide addresses for the last five years, starting with the most current)

Home address _____ Daytime telephone number () _____ E-mail address _____

1	Apartment number	Street number	Street name	Civic number (if applicable)	From Y M	To present
	City		Province or state	Postal code	Country	Telephone number ()

2	Apartment number	Street number	Street name	Civic number (if applicable)	From Y M	To Y M
	City		Province or state	Postal code	Country	Telephone number ()

Have you previously completed a Government of Canada security screening form? Yes No

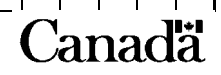
If yes, give name of employer, level and year of screening. _____ Y

CRIMINAL CONVICTIONS IN AND OUTSIDE OF CANADA (see instructions)

Have you ever been convicted of a criminal offence for which you have not been granted a pardon? Yes No

If yes, give details. (charge(s), name of police force, city, province/state, country and date of conviction) _____

Charge(s)	Name of police force	City
Province/State	Country	Date of conviction ▶ Y M D





PERSONNEL SCREENING, CONSENT AND AUTHORIZATION FORM

Surname and full given names	Date of birth	Y	M	D
------------------------------	---------------	---	---	---

C CONSENT AND VERIFICATION (To be completed by the applicant and authorized Departmental/Agency/Organizational Official)

Checks Required (See Instructions)	Applicant's initials	Name of official (print)	Official's initials	Official's Telephone number
1. <input type="checkbox"/> Date of birth, address, education, professional qualifications, employment history, personal character references				()
2. <input type="checkbox"/> Criminal record check				()
3. <input type="checkbox"/> Credit check (financial assessment, including credit records check)				()
4. <input type="checkbox"/> Loyalty (security assessment only)				
5. <input type="checkbox"/> Other (specify, see instructions)				()

The Privacy Act Statement

The information on this form is required for the purpose of providing a security screening assessment. It is collected under the authority of subsection 7(1) of the *Financial Administration Act* and the Government Security Policy (GSP) of the Government of Canada, and is protected by the provisions of the *Privacy Act* in institutions that are covered by the *Privacy Act*. Its collection is mandatory. A refusal to provide information will lead to a review of whether the person is eligible to hold the position or perform the contract that is associated with this Personnel Screening Request. Depending on the level of security screening required, the information collected by the government institution may be disclosed to the Royal Canadian Mounted Police (RCMP) and the Canadian Security Intelligence Service (CSIS), which conduct the requisite checks and/or investigation in accordance with the GSP and to entities outside the federal government (e.g. credit bureaus). It is used to support decisions on individuals working or applying to work through appointment, assignment or contract, transfers or promotions. It may also be used in the context of updating, or reviewing for cause, the reliability status, security clearance or site access, all of which may lead to a re-assessment of the applicable type of security screening. Information collected by the government institution, and information gathered from the requisite checks and/or investigation, may be used to support decisions, which may lead to discipline and/or termination of employment or contractual agreements. The personal information collected is described in Standard PIB PSU 917 (Personnel Security Screening) which is used by all government agencies, except the Department of National Defence PIB DND/PPE 834 (Personnel Security Investigation File), RCMP PIB CMP PPU 065 (Security/Reliability Screening Records), CSIS PIB SIS PPE 815 (Employee Security), and PWGSC PIB PWGSC PPU 015 (Personnel Clearance and Reliability Records) used for Canadian Industry Personnel. Personal information related to security assessments is also described in the CSIS PIB SIS PPU 005 (Security Assessments/Advice).

I, the undersigned, do consent to the disclosure of the preceding information including my photograph for its subsequent verification and/or use in an investigation for the purpose of providing a security screening assessment. By consenting to the above, I acknowledge that the verification and/or use in an investigation of the preceding information may also occur when the reliability status, security clearance or site access are updated or otherwise reviewed for cause under the Government Security Policy. My consent will remain valid until I no longer require a reliability status, a security clearance or a site access clearance, my employment or contract is terminated, or until I otherwise revoke my consent, in writing, to the authorized security official.

Signature Date (Y/M/D)

D REVIEW (To be completed by the authorized Departmental/Agency/Organizational Official responsible for ensuring the completion of sections A, B and C)

Name and title	Telephone number
Address	Facsimile number

E APPROVAL (To be completed by authorized Departmental/Agency/Organizational Security Official only)

I, the undersigned, as the authorized security official, do hereby approve the following level of screening.

Reliability Status

Approved Reliability Status Not approved

Name and title

Signature _____
Date (Y/M/D)

Security Clearance (if applicable)

Level I Level II Level III Not recommended

Name and title

Signature _____
Date (Y/M/D)

Comments

PHOTO
(for Level III T.S.,
and/or upon request
- see instructions)





INSTRUCTIONS FOR PERSONNEL SCREENING CONSENT AND AUTHORIZATION FORM TBS/SCT 330-23E (Rev. 2002/02)

Once completed, this form shall be safeguarded and handled at the level of Protected A.

General:

If space allotted in any portion is insufficient please use separate sheet using same format.

1. Section A (Administrative Information) Authorized Departmental/Agency/Organizational Official

The Official, based on instructions issued by the Departmental Security Officer, may be responsible for determining, based on five year background history, what constitutes sufficient verification of personal data, educational and professional qualifications, and employment history. References are to be limited to those provided on the application for employment or equivalent forms.

SUPPLEMENTAL INFORMATION REQUIREMENTS

Persons who presently hold a SECURITY CLEARANCE and subsequently marry, remarry or commence a common-law partnership, in addition to having to update sections of the *Security Clearance Form (TBS/SCT 330-60)*, are required to submit an original *Personnel Screening, Consent and Authorization Form*, with the following parts completed:

Part A - As set forth in each question

Part B - As set forth in each question, excluding CRIMINAL CONVICTIONS IN AND OUTSIDE OF CANADA.

Part C - Applicant's signature and date only are required

"Other". This should be used to identify if the security screening is for Site Access, NATO, SIGINT etc.

2. Section B (Biographical Information)

To be completed by the **applicant**. If more space is required use a separate sheet of paper. Each sheet must be signed.

Country of Birth - For "NEW" requests, if born abroad of Canadian parents, please provide a copy of your Certificate of Registration of Birth Abroad. If you arrived in Canada less than five years ago, provide a copy of the Immigration Visa, Record of Landing document or a copy of passport.

- List only criminal convictions for which a pardon has NOT been granted. Include on a separate attached sheet of paper, if more than one conviction. Applicant must include those convictions outside Canada.

- Offences under the *National Defence Act* are to be included as well as convictions by courts-martial are to be recorded.

3. Section C (Consent and Verification)

A copy of Section "C" may be released to institutions to provide acknowledgement of consent.

Criminal record checks (fingerprints may be required) and credit checks are to be arranged through the Departmental Security Office or the delegated Officer.

Consent: may be given only by an applicant who has reached the age of majority, otherwise, the signature of a parent or guardian is mandatory.

The age of majority is:

19 years in NFLD., N.S., N.B., B.C., Yukon, Northwest Territories and Nunavut;

18 years in P.E.I., Que., Ont., Man., Sask. and Alta.

The applicant will provide initials in the " applicant's initials box".

The official who carried out the verification of the information will print their name, insert their initials and telephone number in the required space.

- Reliability Screening (for all types of screening identified within Section A): complete numbers 1 and 2 and 3 if applicable.

- Security Clearance (for all types of screening identified within Section A): complete numbers 1 to 4 and 5 where applicable.

- Other: number 5 is used only where prior Treasury Board of Canada Secretariat approval has been obtained.

4. Section D (Review)

To be completed by authorized Departmental/Agency/Organizational Official who is responsible for ensuring the completion of sections A to C as requested.

5. Section E (Approval)

Authorized Departmental/Agency/Organizational Security Official refers to the individuals as determined by departments, agencies, and organizations that may verify reliability information and/or approve/not approve reliability status and/or security clearances. Approved Reliability Status and Level I, II and III, as well as the signature of the authorized security official or manager are added for Government of Canada use only. Applicants are to be briefed, acknowledge, and be provided with a copy of the "Security Screening Certificate and Briefing Form (TBS/SCT 330-47)".

Note: Private sector organizations do not have the authority to approve any level of security screening.

Photographs: Departments/Agencies/Organizations are responsible for ensuring that three colour photographs of passport size are attached to the form for the investigating agency. Maximum dimensions are 50mm x 70mm and minimum are 43mm x 54mm. The face length from chin to crown of head must be between 25mm x 35mm. The photographs must be signed by the applicant and an authorized security official. The photographs must have been taken within the last six months. It is required for new or upgrade Level III security clearances for identification of the applicant during the security screening investigation by the investigating agency. The investigating agency may in specific incidents request a photograph for a Level I or II clearances when an investigation is required.