



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

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

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

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

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

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

**Comments - Commentaires**

<b>Title - Sujet</b> Quantitative	
<b>Solicitation No. - N° de l'invitation</b> 35035-165059/A	<b>Date</b> 2016-08-17
<b>Client Reference No. - N° de référence du client</b> 35035-16-5059	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CY-021-71412	
<b>File No. - N° de dossier</b> cy021.35035-165059	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2016-09-15</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Amaral, Paola	<b>Buyer Id - Id de l'acheteur</b> cy021
<b>Telephone No. - N° de téléphone</b> (613) 998-8588 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> PRIVY COUNCIL OFFICE 66 SLATER ST ROOM 721 OTTAWA Ontario K1A0A3 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

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

**Issuing Office - Bureau de distribution**

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

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

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<b>TOTAL POINTS .....</b>	<b>50</b>
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## **PART 1 - GENERAL INFORMATION**

### **1.1 Introduction**

The bid solicitation is divided into six parts plus annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided; and
- Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes are listed in the Table of Contents.

### **1.2 Summary**

Public Works and Government Services Canada (PWGSC), on behalf of the Privy Council Office (PCO), has a requirement to conduct an on-going **quantitative public opinion research data collection** project to ensure up-to-date and accurate representations of Canadian opinion on various issues, notably as they relate to Government of Canada priorities.

The requirement is subject to the provisions of the Agreement on Internal Trade (AIT).

The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 - Certifications, Part 6 - Resulting Contract Clauses and the annex titled [\*Federal Contractors Program for Employment Equity - Certification\*](#).

### **1.3 Debriefings**

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

## **PART 2 - BIDDER INSTRUCTIONS**

### **2.1 Standard Instructions, Clauses and Conditions**

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

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2016-04-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days  
Insert: 120 days

#### **2.1.1 SACC Manual Clauses**

SACC Manual Clause A3050T (2014-11-27) – Canadian Content Definition  
SACC Manual Clause A3015T (2014-06-26) – Certification – Bid

### **2.2 Submission of Bids**

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile or email to PWGSC will not be accepted.

### **2.3 Former Public Servant**

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

#### **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 FPSs in receipt of a pension, as applicable:

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

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

#### **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

## **2.4 Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

## **2.5 Applicable Laws**

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

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

## **2.6 Basis for Canada's Ownership of Intellectual Property**

The Privy Council Office (PCO) has determined that any intellectual property rights arising from the performance of the work under the resulting contract will belong to Canada, on the following grounds: the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

Canada requests that Bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid (four (4) hard copies and one (1) soft copy on a USB key)

Section II: Financial Bid (one (1) hard copy and one (1) soft copy on a USB key)

Section III: Certifications (one (1) hard copy)

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

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

Canada requests that Bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

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

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

#### **Section I: Technical Bid**

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

#### **Section II: Financial Bid**

Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B" Basis of Payment. The total amount of Applicable Taxes must be shown separately.

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### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### 4.1.1 Technical Evaluation

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

#### 4.1.2 Financial Evaluation

Financial evaluation is fully described in Annex "B3".

### 4.2 Basis of Selection

#### 4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and
  - c. obtain the required minimum points specified for each criterion for the technical evaluation, and
  - d. obtain the required minimum of **735** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **1050** points.
2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **60%** for the technical merit and **40%** for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **60%**.
5. To establish the pricing score, each firm price or rate will be prorated against the lowest firm price or rate for each individual category of service. The ratio of **40 %** will be divided against the five main category services as follows:

- 36/40 - Firm Contract Price for Initial and Option Periods (10 minute interview completions)
- 1/40 - Firm Rate for 11 minutes of interview completions (Landline)
- 1/40 - Firm Rate for 11 minutes of interview completions (Cell-phone Only)
- 1/40 - Firm Rate for 12 minutes of interview completions (Landline)
- 1/40 - Firm Rate for 12 minutes of interview completions (Cell-phone Only)

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$55,000.00.

**Basis of Selection – Highest Combined Rating Technical Merit (60%) and Price (40%)**

		<b>Bidder A</b>	<b>Bidder B</b>	<b>Bidder C</b>	<b>Bidder D</b>
<b>Overall Technical Score</b>		115/135	89/135	107/135	92/135
<b>Average Bid Evaluation Price</b>		\$55,000.00	\$64,298.00	\$69,996.87	\$71,409.33
<b>Calculations</b>	<b>Technical Merit Score</b>	115/135 x 60 = 51.11	89/135 x 60 = 39.56	107/135 x 60 = 47.56	92/135 x 60 = 40.89
	<b>Total Weighted Financial Score</b>	39.360	33.777	30.439	30.644
<b>Combined Rating</b>		90.470	73.337	77.999	71.534
<b>Overall Rating</b>		1 <sup>st</sup>	3 <sup>rd</sup>	2 <sup>nd</sup>	4 <sup>th</sup>

## **PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION**

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### **5.1 Certifications Required with the Bid**

Bidders must submit the following duly completed certifications as part of their bid:

#### **5.1.1 Integrity Provisions – Declaration of Convicted Offences**

In accordance with the *Ineligibility and Suspension Policy* (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politiquepolicy-eng.html>), the Bidder must provide with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

### **5.2 Certifications Precedent to Contract Award and Additional Information**

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### **5.2.1 Integrity Provisions – Required Documentation**

In accordance with the *Ineligibility and Suspension Policy* (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politiquepolicy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### **5.2.2 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 available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website ([http://www.esdc.gc.ca/en/jobs/workplace/human\\_rights/employment\\_equity/federal\\_contractor\\_program.page?&\\_ga=1.229006812.1158694905.1413548969#afed](http://www.esdc.gc.ca/en/jobs/workplace/human_rights/employment_equity/federal_contractor_program.page?&_ga=1.229006812.1158694905.1413548969#afed)).

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.

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Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex [Federal Contractors Program for Employment Equity - Certification](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

### **5.2.3 Additional Certifications Precedent to Contract Award**

#### **5.2.3.1 Canadian Content Certification**

*SACC Manual* clause [A3050T](#) (2014-11-27) – Canadian Content Definition.

This procurement is limited to Canadian Services.

The Supplier certifies that:

( ) The service offered is a Canadian service as defined in paragraph 2 of clause A3050T.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.3.2 Status and Availability of Resources

*SACC Manual* clause A3005T (2010-08-16) – Status and Availability of Resource

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

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 5.2.3.3 Education and Experience

*SACC Manual* clause A3010T (2010-08-16) – Education and Experience

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

Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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#### 5.2.3.4 Bilingual Capabilities

The bidder must certify that the proposed project team will have the ability to conduct research in both official languages.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

#### 5.2.3.5 Market Research Standards

The Bidder must agree in writing to conform to all the applicable research standards of the Government of Canada (<http://publiservice.tpsgc-pwgsc.gc.ca/rop-por/recherche-research-eng.html#a1>); and the Market Research and Intelligence Association of Canada (<http://mria-arim.ca/about-mria/standards/code-of-conduct-for-members>).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## **PART 6 - RESULTING CONTRACT CLAUSES**

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### **6.1 Statement of Work**

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

### **6.2 Standard Clauses and Conditions**

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

#### **6.2.1 General Conditions**

2035 (2016-04-04) – General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

#### **6.2.2 Supplemental General Conditions**

4008 (2008-12-12) – Personal Information, apply to and form part of the Contract.

### **6.3 Security Requirements**

There is no security requirement applicable to this Contract.

### **6.4 Term of Contract**

#### **6.4.1 Period of the Contract**

The period of the Contract is from date of contract award to \_\_\_\_\_, inclusive.

#### **6.4.2 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least thirty (30) calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

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## 6.5 Authorities

### 6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

**Paola Amaral**  
Supply Specialist  
Communications Procurement Directorate  
Acquisitions Branch  
Public Works and Government Services Canada  
360 Albert Street, 12th Floor  
Ottawa, Ontario K1A 0S5

Telephone: 613-998-8588  
Facsimile: 613-991-5870  
E-mail: paola.amaral@pwgsc-tpsgc.gc.ca

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

### 6.5.2 Project Authority

The Project Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
E-mail address: \_\_\_\_\_

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

### 6.5.3 Contractor's Representative

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
E-mail address: \_\_\_\_\_

## 6.6 Proactive Disclosure of Contracts with Former Public Servants

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

## 6.7 Payment

### 6.7.1 Firm Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex "B" Basis of payment for a cost of \$ \_\_\_\_\_. Customs duties are included and Applicable Taxes are extra.

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

### 6.7.2 Discretionary Audit

*SACC Manual* clause C0705C (2010-01-11) – Discretionary Audit

## 6.8 Identification of the Fieldwork Sub-Contractor

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

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

To replace the Fieldwork Sub-Contractor, the Contractor must submit all required documentation in accordance with the applicable rated requirements of the Request for Proposal (RFP).

The sub-contractor is:

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

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

## 6.9 Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
  - b. a copy of the release document and any other documents as specified in the Contract;
  - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
  - d. a copy of the monthly progress report.
2. Invoices must be distributed as follows:
- a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
  - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## **6.10 Certifications**

### **6.10.1 Compliance**

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing additional information are conditions of the Contract. Certifications are subject to verification by Canada during the entire period of the Contract. If the Contractor does not comply with any certification, fails to provide the additional information, or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

### **6.10.2 Federal Contractors Program for Employment Equity - Default by the Contractor**

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

## **6.11 Applicable Laws**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Ontario.

## **6.12 Priority of Documents**

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4008 (2008-12-12) – Personal Information;

- (c) the general conditions 2035 (2016-04-04) – General Conditions - Higher Complexity - Services;
- (d) Annex “A”, Statement of Work;
- (e) Annex “B”, Basis of Payment, Pricing – Quantitative Surveys;
- (f) the Contractor's bid dated \_\_\_\_\_.

### 6.13 Political Neutrality Certification

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

### 6.14 Protection and Security of Data Stored in Database

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:
  - a. equivalent protections are given to personal information as in Canada under legislation such as the *Privacy Act*, R.S. 1985, c.P-21, and the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and
  - b. the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.
4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing

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to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.

6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

## **ANNEX "A" STATEMENT OF WORK**

### **TITLE**

Continuous Tracking of Canadians' Views - Quantitative Survey

### **BACKGROUND**

The Privy Council Office (PCO) is the hub of non-partisan, public service support to the Prime Minister and Cabinet and its decision-making structures. Led by the Clerk of the Privy Council, PCO helps the Government implement its vision and respond effectively and quickly to issues facing the government and the country.

As an advisor to the Prime Minister, PCO brings together quality, objective policy advice and information to support the Prime Minister and Cabinet, including information on the priorities of Canadians.

To this end, the Communications and Consultation Secretariat within PCO supports the Prime Minister's Office in coordinating government communications and setting broad government communications themes and messages, in accordance with government priorities, as determined by the Prime Minister, Cabinet, Cabinet committees and the Clerk of the Privy Council. The Secretariat also works with PCO policy secretariats to advise and support Cabinet and its committees.

In fulfilling its mandate, PCO requires ongoing quantitative data collection to ensure that it has up-to-date representations of Canadians' opinions on macro-level issues that are of interest to the government, such as their views on what should be the priorities of the government. Additionally, such research increases our understanding of emerging trends, and will measure Canadians' views on key national issues and policy initiatives.

### **PURPOSE OF THE PROJECT AND OBJECTIVES**

Through the use of a continuous telephone survey, PCO would like to gain a solid understanding of Canadians' views as they relate to the most important issues facing the country; their perceptions of how the federal government can best address these issues; expectations of actions related to government priorities; and perspectives on how the government can most effectively convey its efforts in dealing with emerging issues. Moreover, statistically representative data will enable PCO to measure changes in public perceptions over time.

This research will inform the development of communications messages, products and dissemination tactics to respond to priority issues. Additionally, the research will allow the Government of Canada to develop and refine communications activities to meet the specific needs of Canadians with timely, up-to-date, easily understood information based on the current perceptions of Canadians in the requisite areas.

### **TARGET POPULATION**

The target population for the survey is all Canadians (aged 18+).

## **DATA COLLECTION**

Data will be collected through a rolling poll. Over the course of one year, the research firm will conduct a 10-minute telephone interview among a random, representative sample of 500 Canadians each week (with the possibility for a slight oversample, if required, in any region). At the culmination of the year, the sample will comprise 26,000 Canadians.

The research firm will be responsible for providing weekly and cumulative results in the form of an SPSS file, to be sent to the project authority. Data tables in English and French with cumulative results will be required once every 3 months. A methodology report will also be required on a quarterly basis.

In order to increase the proportion of younger Canadians (i.e. 18-34) in the sample, the research firm will need to incorporate cell phone only (CPO) respondents each week (n=100) and provide a description of how the CPO sample was obtained. The sample frame will therefore consist of 400 landline respondents and 100 CPO respondents each week. At the culmination of the year, the sample will comprise 20,800 landline respondents and 5,200 CPO respondents.

The research firm should also indicate the anticipated response rate and detail the steps that will be taken to achieve this response rate.

## **DESCRIPTION AND SCOPE OF THE WORK**

The project authority will provide the research firm with the draft research instrument. The questionnaire will comprise core tracking questions and rotating questions on emerging key issues. The research firm should assume that on average, 40% of the content will change for each new week of data collection. The research firm should also assume that the questionnaire will include up to three open-ended questions, requiring coding.

The research firm will be required to carry out the following tasks:

1. Attend meetings (in person or via conference call) with the project authority to discuss research purpose and objectives, design issues, research schedule and draft report, etc.;
2. Ensure the research complies with the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys*;
3. Provide client liaison in either official language;
4. Advise on sample design, including size, weighting and definition of survey respondents and other aspects of the research methodology;
5. Review questionnaires provided by PCO, translate them into the other official language and revise them as required;
6. Provide an analysis plan that relates the survey questions and analytical methods to the research objectives;
7. Program a questionnaire using a computer assisted telephone interviewing (CATI) system (or otherwise reproduce the questionnaire for interviews);
8. Inform respondents of their rights under the *Access to Information and Privacy Act (ATIP)* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying both the sponsoring department or agency

and research firm; and informing respondents that their participation is voluntary and the information provided will be administered according to the requirements of ATIP;

9. Pre-test the questionnaire in both English and French (with probing as per standards), and as needed each week thereafter. A minimum of 10 probing pre-test sessions are to be completed in English and French with the target audience. The project authority may also ask to monitor pre-tests;
10. Provide a briefing on the pre-test results;
11. Register the survey with the National Survey Registration System;
12. Develop a sampling frame and approach;
13. Clean lists;
14. Provide respondent support;
15. Ensure effective quality control measures;
16. Ensure data is stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
17. Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork;
18. Conduct fieldwork in the preferred official language of the respondents, supervised by bilingual personnel to achieve the required completions. Calls are to be varied throughout the day, which includes both daytime and evening calls. This is limited to 9 p.m. in any given time zone;
19. Ensure effective bilingual quality control measures;
20. Ensure a minimum number of call backs (i.e. eight (8) for landline telephone interviews and five (5) for cellphone only household interviews);
21. Enter results and analyze the resulting interview data to create tables and coding procedures defined in consultation with the project authority; code open ended questions off-line;
22. When travel is required, provide a detailed estimate for approval by the project authority, outlining the names of the individuals travelling, estimated costs for travel (i.e. flight and/or ground transportation, accommodations, meals and incidentals);
23. Provide the project authority with progress reports, including weighted partial results immediately following completion of each week of fieldwork (including SPSS format); produce an analysis plan for the data tables (also known as tabs or cross tabulations);
24. Provide a draft methodological report in the official language chosen by the project authority, interpreting the results based on the approved analysis plan;
25. Provide a final copy of the methodological report (electronic and hard copy) following receipt of the project authority's comments on the draft copy. The written report must include relevant content as per the Public Opinion Research Final Report Checklist;

26. Provide a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS). All personal information/identifiers must be removed from the SPSS dataset;
27. Provide and translate the methodological report(s) into the other official language;
28. Perform other activities or services as per specific project requirements.
29. Identify the senior researchers managing the survey, their experiences, and their replacement. Any changes in the project management team needs to be approved by the project authority.
30. Highlight any concerns, and potential recommendations, if any, with fielding this survey on a weekly basis. Examples of potential issues could include, but are not limited to (a) fielding the survey during holiday periods, e.g. Christmas/New Year period, March Break, Thanksgiving, etc., (b) data and report deliveries during holiday periods, (c) any other potential issues, etc.
31. Include any tracking tools to help the project authority read the data on a weekly, or three-week rolling basis, in addition to the SPSS.

## **DELIVERABLES**

The research firm will be responsible to:

- Meet or exceed the Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys as well as the relevant laws, regulations, and policies, for example, the *Personal Information Protection and Electronic Documents Act*, the *Privacy Act*, the *Federal Accountability Act*, *Official Languages Act*, and the Government of Canada Policy on Communications and Federal Identity; details can be found at <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>. Where no relevant Government of Canada standards exist, researchers must meet or exceed industry standards, including those of the Marketing Research and Intelligence Association (MRIA).
- Provide regular progress reports (notably weekly and cumulative results in the form of a fully labeled and coded SPSS file and detailed data tables) as requested;
- Provide a draft English methodological report to PCO for comments and feedback;
- Provide a quarterly methodological report to PCO as described in the Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys, including a detailed description of the project background, objectives, methodology, and data collection instruments. The quarterly methodological report(s) need(s) to be in both official languages and in accordance with the Procedures for the Management of Public Opinion Research;
- The methodological report must also contain a discussion of the potential for non-response bias for the survey as a whole and for key survey variables. Non-response bias is the systematic difference between true population values and the average result from all possible samples owing to non-response.
  - The analysis of non-response bias will consist of a comparison of at least three variables in the survey sample with the equivalent parameters of the population, normally available from Statistics Canada. No extra surveys or interviews are required.

- Produce two accessible electronic copies (one in MS Word format and one in Adobe Acrobat PDF format) of the final methodology report;
- Provide final data tables at the completion of data collection;
- Provide final fully labelled SPSS dataset at the completion of data collection.

### **Report Requirements**

A) The executive summary in English and French should include the following information on the cover page:

1. The title of the project;
2. The name of the research firm that entered into the contract;
3. The contract number and the award date;
4. The POR Registration Number;
5. The delivery date (this is the date that the final report, accepted in its final version by the project authority, was sent by the research firm to the project authority);
6. The name of the client department or agency sponsoring the research;
7. The departmental contact information in the form of a generic email address; and
8. For the English version, the statement "Ce rapport est aussi disponible en français" and for the French version, the statement "This report is also available in English."

B) The executive summary should consist of, at a minimum:

1. A statement of the research purpose and objectives;
2. An outline of how the results were used, if possible, and if not, how the information is expected to be used;
3. A brief description of the methodology;
4. Total contract value of the POR project;
5. A statement as to the extent to which the findings can be extrapolated to a broader audience;
6. The total expenditures of the POR project;
7. In the first quarterly methodological report, a full description of the project methodology as a whole, and not just the data collected to date.

C) Each methodological report should have the same elements of the executive summary above and include the appendices listed below:

1. A full set of tabulated data;
2. Sample size, sampling procedures and dates of research fieldwork;
3. Weighting procedures, the confidence interval and the margin of error;
4. A discussion of the potential for non-response bias;
5. The response rate and method of calculation;
6. The research instruments used; and
7. All other information about the execution of the fieldwork that would be needed to replicate the research initiative.

### **TIMELINES**

Outlined below is our proposed timing for the survey. Assuming a start date of August 25, 2016, the timing outlines activities for the first three weeks of the project. The research firm should assume that this three-week schedule will follow for each subsequent three-week period of the contract.

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A sample calendar is provided on the following pages.

**Week 1**

Finalize methodology	November 24, 2016
Final questionnaire provided to research firm	November 29, 2016
Pre-test	November 30, 2016
<b>Fieldwork launched</b>	<b>December 2, 2016</b>
Week 1 fieldwork ends	December 7, 2016
Final uncoded data file	December 8, 2016
Fully coded SPSS data file	December 12, 2016

**Week 2**

Updated questionnaire provided to research firm	December 6, 2016
Pre-test	December 8, 2016
<b>Fieldwork launched</b>	<b>December 9, 2016</b>
Week 2 fieldwork ends	December 14, 2016
Final uncoded data file	December 15, 2016
Fully coded SPSS data file	December 19, 2016

**Week 3**

Updated questionnaire provided to research firm	December 13, 2016
Pre-test	December 15, 2016
<b>Fieldwork launched</b>	<b>December 16, 2016</b>
Week 3 fieldwork ends	December 21, 2016
Final uncoded data file	December 22, 2016
Fully coded data tables and SPSS data file	December 28, 2016*

\*the timeline has been adjusted to account for statutory holidays

A final methodology report and a final set of data tables, including all data collected over the course of the year, will be due within two (2) weeks following the completion of data collection. Finalization of the methodology report will follow approval from project authority.

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**Calendar – Week 1**

First month						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		New questions finalized		Pretest new questionnaire	Launch survey	
				Closed –ended data		
	Fully coded data		Data reporting			

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**Calendar – Week 2**

First month						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		New questions finalized		Pretest new questionnaire	Launch survey	
				Closed –ended data		
	Fully coded data		Data reporting			

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**Calendar – Week 3**

First month						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		New questions finalized		Pretest new questionnaire	Launch survey	
				Closed –ended data		
	Fully coded data		Data reporting			

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**ANNEX "B"**  
**BASIS OF PAYMENT, PRICING – QUANTITATIVE SURVEYS,  
AND FINANCIAL EVALUATION**

Annex "B1" – Basis of Payment  
Annex "B2" – Pricing – Quantitative Surveys  
Annex "B3" – Financial Evaluation

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**ANNEX "B1"**  
**BASIS OF PAYMENT**

**B1.1 NOTE TO BIDDERS**

Bidders are requested to submit rates and fees, specified below, for all the periods.

- Firm, all inclusive, hourly rates for all Professional Services;
- Firm, all inclusive, rates for Landline Telephone Interviewing;
- Firm, all inclusive, rates for Cell-Phone Only Telephone Interviewing;
- Firm, all inclusive, hourly rates for Other Related Services;

The rates and level of effort submitted under B2 – Pricing will be used to calculate the Firm price of each period.

All provided rates and fees under B2 – Pricing will be evaluated under B3 – Financial Evaluation.

The Contractor will be paid in accordance with the following Basis of Payment for work performed pursuant to the resulting Contract.

The names of resources which will be identified in the resulting contract must meet the minimum requirements for the category of service for which they are being proposed, as described in Annex "C" - Technical Evaluation Criteria.

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

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

Canada will not accept any travel and living expenses incurred by any contractor as a consequence of any relocation required to satisfy the terms of any resulting contract.

The rates are in Canadian currency, Customs and duties are included, and Applicable Taxes are extra, if applicable.

All deliverables are F.O.B. Destination, and Canadian Customs Duty included, where applicable.

All prices and amounts of money in the Contract are exclusive of Applicable Taxes unless otherwise indicated. The Applicable Taxes, whichever is applicable, is extra to the price herein and will be paid by Canada. Applicable Taxes, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated, exempt or to which the Applicable Taxes does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to Canada Customs and Revenue Agency any amounts of Applicable Taxes paid or due.

## **B1.2 FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS**

### **B1.2.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER**

The survey field manager will be responsible to act as:

- Client liaison
- Immediate supervision of all aspects of the fieldwork, including:
  - ✓ programming of study questionnaire in CATI or equivalent software and data entry;
  - ✓ sample and quota management;
  - ✓ administration of pre-test;
  - ✓ on-going project support during data collection;
  - ✓ troubleshooting;
  - ✓ development of a code list for open ended questions;
  - ✓ data weighting;
  - ✓ monitoring of response rates and subsequent reporting;
  - ✓ provision of deliverables, including data files and detailed tables; and
- Outline variables and cross-tabulation of the requirements for the detailed tables including production of tables.

### **B1.2.2 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT**

The fixed prices includes the services described below:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a probability based sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test;

- 
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
  - Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
  - Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
  - Making a minimum of 8 call backs;
  - Monitor call dispositions/reasons for non-response throughout the field period;
  - Providing quality control;
  - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
  - All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
  - Coding of open ended questions off-line;
  - Assume 10% of the interview duration will include open-ended questions;
  - Data entry of results;
  - Create frequencies and cross tabulation tables;
  - Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
  - Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
  - Provide a methodological report with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "F"); and
  - Certify by the Contractor's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

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

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

### **B1.2.3 CELL-PHONE ONLY TELEPHONE INTERVIEWS, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT**

The fixed unit price includes the services described below:

- Registering the survey with the National Survey Registration System;
- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a cell-phone only sample;

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

These rates assume that no screening criteria are applied.

### **B1.3 SUBCONTRACTED SERVICES**

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

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

### **B1.4 DIRECT EXPENSES – EXTERNAL AND INTERNAL**

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

### **B1.5 PRICE SUPPORT**

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

### **B1.6 CONTRACTUAL JOINT VENTURE (if applicable)**

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

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## **ANNEX "B2" PRICING – QUANTITATIVE SURVEYS**

The Bidder must provide **firm rates**, in Canadian currency, taxes extra, for the initial period of the Contract and for each of the option periods thereafter.

The firm all inclusive price for the contract period plus options will be calculated under B2.2.

### **B2.1 FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS**

#### **B2.1.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER**

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

Survey Field Manager	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
<i>(Add lines if required)</i>						
<b>B2.1.1 TOTAL</b>	\$ _____		\$ _____		\$ _____	

**B2.1.2 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT – 10 MINUTES**

**TABLE B2.1.2 Firm rates for landline telephone interview completions with the adult general public, inclusive of data tabulation and methodological report:**

Duration	Initial Contract Period Firm Rate (\$) for each sample	First Option Year Firm Rate (\$) for each sample	Second Option Year Firm Rate (\$) for each sample
10 minutes			
400/week x 52 weeks	x 20,800	x 20,800	x 20,800
<b>B2.1.2 TOTAL</b>	\$ _____	\$ _____	\$ _____

**B2.1.3 CELL-PHONE ONLY TELEPHONE INTERVIEWS, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT – 10 MINUTES**

These rates assume that no screening criteria are applied.

**TABLE B2.1.3 Firm rates for telephone interview completions with cell-phone only households, inclusive of data tabulation and methodological report:**

Duration	Initial Contract Period Firm Rate (\$) for each sample	First Option Year Firm Rate (\$) for each sample	Second Option Year Firm Rate (\$) for each sample
10 minutes			
100/week x 52 weeks	x 5,200	x 5,200	x 5,200
<b>B2.1.3 TOTAL</b>	\$ _____	\$ _____	\$ _____

**B2.1.4 OTHER PROFESSIONAL RATES**

This section should be completed by the Bidder who would like to identify other categories of personnel to be used during the initial contract period and the option periods. If, for example, the Bidder intends to use the services of a Junior Researcher, it **must** indicate this category in the table below.

The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Bidder **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of Personnel (Identify)	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
<i>(Add lines if required)</i>						
<b>B2.1.4 TOTAL</b>	\$ _____		\$ _____		\$ _____	

**B2.1.5 DIRECT AND SUB-CONTRACTED EXPENSES**

The Bidder should provide an estimated cost, excluding GST/HST, for direct and subcontracted expenses for each contract period. As per B1.2 and B1.3 these costs are to be billed at cost, with no allowance for overhead or profit.

Direct and Sub-contracted Expenses Breakdown	Initial Contract Period	First Option Year	Second Option Year
<i>(Add lines if required)</i>			
<b>TOTAL</b>	\$ _____	\$ _____	\$ _____

**B2.2 FIRM ALL INCLUSIVE PRICE**

The following table is the firm all inclusive price (including a 10 minute survey only) submitted by the Bidder for the initial contract period and for each additional option years. The average between all periods will be used as the Bid Evaluation Value.

Please complete the table using the totals from tables B2.1.1, B2.1.2, B2.1.3, B2.1.4, and B2.1.5.

	INITIAL CONTRACT PERIOD	1 <sup>st</sup> OPTION PERIOD	2 <sup>nd</sup> OPTION PERIOD
<b>B2.1.1 Total</b>	\$ _____	\$ _____	\$ _____
<b>B2.1.2 Total</b>	\$ _____	\$ _____	\$ _____
<b>B2.1.3 Total</b>	\$ _____	\$ _____	\$ _____
<b>B2.1.4 Total</b>	\$ _____	\$ _____	\$ _____
<b>B2.1.5 Total</b>	\$ _____	\$ _____	\$ _____
<b>FIRM ALL INCLUSIVE PRICE (EXCLUDING GST/HST)</b>	\$ _____	\$ _____	\$ _____

**B2.3 FIRM RATES FOR OPTIONAL 11 and 12 MINUTE INTERVIEWS**

Please note these rates will **not** form part of the Firm Price. However, they will be rated as outlined in Annex "B3".

**TABLE B2.3.1 Firm rates for 11 and 12 minute landline telephone interview completions with the adult general public, inclusive of data tabulation and methodological report:**

Duration	Initial Contract Period Firm Rate (\$) for <u>each</u> sample	First Option Year Firm Rate (\$) for <u>each</u> sample	Second Option Year Firm Rate (\$) for <u>each</u> sample
11 minutes			
12 minutes			

**TABLE B2.3.2 Firm rates for 11 and 12 minute telephone interview completions with cell-phone only households, inclusive of data tabulation and methodological report:**

Duration	Initial Contract Period Firm Rate (\$) for <u>each</u> sample	First Option Year Firm Rate (\$) for <u>each</u> sample	Second Option Year Firm Rate (\$) for <u>each</u> sample
11 minutes			
12 minutes			

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**ANNEX "B3"  
 FINANCIAL EVALUATION**

The following steps will be followed for the Financial Evaluation using the rates or fees provided in the Annex "B2" of the Basis of Payment:

- **B.3.1 Firm Contract Price for Initial and Option Periods**
- **B.3.2a Firm Rate for 11 minutes of interview completions (Landline)**
- **B.3.2b Firm Rate for 11 minutes of interview completions (Cell-phone Only)**
- **B.3.3a Firm Rate for 12 minutes of interview completions (Landline)**
- **B.3.3b Firm Rate for 12 minutes of interview completions (Cell-phone Only)**
- **B.3.4 Total weighted financial score**

The entire Financial Evaluation is worth 40% of the total proposal final score. The allotment per step above will be as follows:

**POINTS ALLOTTED TABLE:**

Steps of Financial Evaluation	Weighting	Points Allotted (for calculation purposes)
B.3.1 Firm Contract Price for Initial and Option Periods (10 minute interview completions)	90%	36
B.3.2a Firm Rate for 11 minutes of interview completions (Landline)	2.5%	1
B.3.2b Firm Rate for 11 minutes of interview completions (Cell-phone Only)	2.5%	1
B.3.3a Firm Rate for 12 minutes of interview completions (Landline)	2.5%	1
B.3.3b Firm Rate for 12 minutes of interview completions (Cell-phone Only)	2.5%	1
<b>TOTAL</b>	<b>100%</b>	<b>40</b>

**B.3.1 FIRM CONTRACT PRICE FOR INITIAL AND OPTION PERIODS**

**Step 1:** An average firm contract price will be calculated using the firm price submitted for each years of the contract (initial 1-year period, first option and second option) in B2.1.1, B2.1.2, B2.1.3, B2.1.4, and B2.1.5.

**Example of Step 1:**

Bidder	Firm Price for Initial Contract Period	Firm Price for First Option Period	Firm Price for Second Option Period	Average Firm Contract Price
<b>Bidder A</b>	\$50,000.00	\$55,000.00	\$60,000.00	\$55,000.00

<b>Bidder B</b>	\$60,000.00	\$64,200.00	\$68,694.00	\$64,298.00
<b>Bidder C</b>	\$65,000.00	\$69,875.00	\$75,115.62	\$69,996.87
<b>Bidder D</b>	\$70,000.00	\$71,400.00	\$72,828.00	\$71,409.33

**Step 2:**

The weighted Financial Score will be determined for each Bidder.

The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**

Lowest Average Firm Contract Price X 36 *divided by* Bidder's Average Firm Contract Price = Weighted Financial Score for Firm Contract Price for Initial and Option Periods

<b>Bidder</b>	<b>Average Firm Contract Price</b>	<b>Total Weighted Financial Score</b>
<b>Bidder A</b>	\$55,000.00	36.000
<b>Bidder B</b>	\$64,298.00	30.794
<b>Bidder C</b>	\$69,996.87	28.287
<b>Bidder D</b>	\$71,409.33	27.727

**B.3.2a FIRM RATE FOR 11 MINUTES OF INTERVIEW COMPLETIONS (LANDLINE)**

**Step 1:** An average firm rate will be calculated using the rates submitted for each years of the contract (initial 1-year period, first option and second option) in B2.3.1.

**Example of Step 1:**

<b>Bidder</b>	<b>Initial Contract Period Firm Rate (\$) for each sample</b>	<b>First Option Year Firm Rate (\$) for each sample</b>	<b>Second Option Year Firm Rate (\$) for each sample</b>	<b>Average Firm Rate (\$)</b>
<b>Bidder A</b>	\$5.00	\$5.15	\$5.25	\$5.13
<b>Bidder B</b>	\$3.00	\$3.10	\$3.20	\$3.10
<b>Bidder C</b>	\$6.00	\$6.20	\$6.25	\$6.15
<b>Bidder D</b>	\$6.50	\$6.55	\$6.60	\$6.55

**Step 2:**

The weighted Financial Score will be determined for each Bidder.

The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**

Lowest Average Firm Rate X 1 *divided by* Bidder's Average Firm Rate = Weighted Financial Score for 11 Minutes of Interview Completions (Landline) for Initial and Option Periods

Bidder	Average Firm Rate for 11 minutes of interviewing (Landline)	Total Weighted Financial Score
Bidder A	\$5.13	0.604
Bidder B	\$3.10	1.000
Bidder C	\$6.15	0.504
Bidder D	\$6.55	0.473

### B.3.2b FIRM RATE FOR 11 MINUTES OF INTERVIEW COMPLETIONS (CELL-PHONE ONLY)

**Step 1:** An average firm rate will be calculated using the rates submitted for each years of the contract (initial 1-year period, first option and second option) in B2.3.2.

**Example of Step 1:**

Bidder	Initial Contract Period Firm Rate (\$) for each sample	First Option Year Firm Rate (\$) for each sample	Second Option Year Firm Rate (\$) for each sample	Average Firm Rate (\$)
Bidder A	\$4.00	\$4.10	\$4.15	\$4.08
Bidder B	\$3.00	\$3.20	\$3.25	\$3.15
Bidder C	\$5.00	\$5.20	\$5.40	\$5.20
Bidder D	\$4.50	\$4.75	\$4.95	\$4.73

**Step 2:**

The weighted Financial Score will be determined for each Bidder.

The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**

Lowest Average Firm Rate X 1 *divided by* Bidder's Average Firm Rate = Weighted Financial Score for 11 Minutes of Interview Completions (Cell-phone only) for Initial and Option Periods

Bidder	Average Firm Rate for 11 minutes of interviewing (Cell-Phone Only)	Total Weighted Financial Score
Bidder A	\$4.08	0.772
Bidder B	\$3.15	1.000
Bidder C	\$5.20	0.606
Bidder D	\$4.73	0.666

### B.3.3a FIRM RATE FOR 12 MINUTES OF INTERVIEW COMPLETIONS (LANDLINE)

**Step 1:** An average firm rate will be calculated using the rates submitted for each years of the contract (initial 1-year period, first option and second option) in B2.3.1.

**Example of Step 1:**

Bidder	Initial Contract Period Firm Rate (\$) for <u>each</u> sample	First Option Year Firm Rate (\$) for <u>each</u> sample	Second Option Year Firm Rate (\$) for <u>each</u> sample	Average Firm Rate (\$)
Bidder A	\$5.25	\$5.45	\$6.00	\$5.57
Bidder B	\$8.55	\$8.95	\$9.05	\$8.85
Bidder C	\$7.35	\$7.75	\$7.15	\$7.42
Bidder D	\$5.15	\$5.55	\$5.75	\$5.48

**Step 2:**

The weighted Financial Score will be determined for each Bidder. The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**

Lowest Average Firm Rate X 1 *divided by* Bidder's Average Firm Rate = Weighted Financial Score for 12 Minutes of Interview Completions (Landline) for Initial and Option Periods

Bidder	Average Firm Rate for 12 minutes of interviewing (Landline)	Total Weighted Financial Score
Bidder A	\$5.57	0.984
Bidder B	\$8.85	0.619
Bidder C	\$7.42	0.739
Bidder D	\$5.48	1.000

### B.3.3b FIRM RATE FOR 12 MINUTES OF INTERVIEW COMPLETIONS (CELL-PHONE ONLY)

**Step 1:** An average firm rate will be calculated using the rates submitted for each years of the contract (initial 1-year period, first option and second option) in B2.3.2.

**Example of Step 1:**

Bidder	Initial Contract Period Firm Rate (\$) for <u>each</u> sample	First Option Year Firm Rate (\$) for <u>each</u> sample	Second Option Year Firm Rate (\$) for <u>each</u> sample	Average Firm Rate (\$)
--------	---------------------------------------------------------------	---------------------------------------------------------	----------------------------------------------------------	------------------------

<b>Bidder A</b>	\$3.14	\$3.74	\$4.07	\$3.65
<b>Bidder B</b>	\$9.52	\$10.05	\$10.50	\$10.02
<b>Bidder C</b>	\$11.30	\$11.75	\$13.10	\$12.05
<b>Bidder D</b>	\$4.52	\$4.70	\$4.85	\$4.69

**Step 2:**

The weighted Financial Score will be determined for each Bidder.  
The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

**Example of Step 2:**

Lowest Average Firm Rate X 1 *divided by* Bidder's Average Firm Rate = Weighted Financial Score for 12 Minutes of Interview Completions (Cell-phone only) for Initial and Contract Periods

<b>Bidder</b>	<b>Average Firm Rate for 12 minutes of interviewing (Cell-Phone Only)</b>	<b>Total Weighted Financial Score</b>
<b>Bidder A</b>	\$3.65	1
<b>Bidder B</b>	\$10.02	0.364
<b>Bidder C</b>	\$12.05	0.303
<b>Bidder D</b>	\$4.69	0.778

**B.3.4 TOTAL WEIGHTED FINANCIAL SCORE**

The total scores calculated under B.3.1, B.3.2a, B.3.2b, B.3.3a, and B.3.3b will be totaled to determine the total weighted financial score of the financial proposal.

**Example:**

<b>Financial Evaluation</b>	<b>BIDDER A</b>	<b>BIDDER B</b>	<b>BIDDER C</b>	<b>BIDDER D</b>
B.3.1 Firm Contract Price for Initial and Option Periods	36.000	30.794	28.287	27.727
B.3.2a Firm Rate for 11 minutes of interview completions (Landline)	0.604	1.000	0.504	0.473
B.3.2b Firm Rate for 11 minutes of interview completions (Cell-phone Only)	0.772	1.000	0.606	0.666
B.3.3a Firm Rate for 12 minutes of interview completions (Landline)	0.984	0.619	0.739	1.000
B.3.3b Firm Rate for 12 minutes of interview completions (Cell-phone Only)	1.000	0.364	0.303	0.778
<b>TOTAL WEIGHTED FINANCIAL SCORE</b>	<b>39.360</b>	<b>33.777</b>	<b>30.439</b>	<b>30.644</b>

**ANNEX "C"  
TECHNICAL EVALUATION CRITERIA**

<b>EVALUATION SUMMARY</b>		
<b>1. MANDATORY REQUIREMENTS:</b>	<input type="checkbox"/> <b>MET</b>	<input type="checkbox"/> <b>NOT MET</b>
<b>2. RATED REQUIREMENTS:</b>	<b>Minimum Points Required</b>	<b>Maximum Points</b>
<b>R.1: Understanding the Requirement</b>	<b>35</b>	<b>50</b>
<b>R.2: Methodology</b>	<b>350</b>	<b>500</b>
a) Methodology and Research Procedures	140	200
b) Data Collection and Quality Control	105	150
c) Issues and Challenges	105	150
<b>R.3: Fieldwork Manager – Qualifications</b>	<b>105</b>	<b>150</b>
a) Academic Qualifications	35	50
b) Work Experience	70	100
<b>R.4: Fieldwork Manager – Sample Projects</b>	<b>70</b>	<b>100</b>
a) Project #1	35	50
b) Project #2	35	50
<b>R.5: Fieldwork Firm / Sub-Contractor's Experience</b>	<b>175</b>	<b>250</b>
a) Recency of the Project	84	120
b) Sample Size and Questionnaire Duration	56	80
c) Sampling Distribution	35	50
<b>OVERALL TOTAL</b>	<b>735</b>	<b>1050</b>

**1. MANDATORY TECHNICAL EVALUATION CRITERIA**

Bidders must meet ALL of the Mandatory Evaluation Criteria. If a bidder fails to meet any of the Mandatory Evaluation Criteria, the bid will not be evaluated any further.

**M.1 Fieldwork Manager**

The bidder must identify one (1) fieldwork manager who is able to communicate with the project authority in English and one (1) fieldwork manager who is able to communicate with the project authority in French. The individual identified for each language can be the same person. The bidder must provide the curriculum vitae of the proposed fieldwork manager. The curriculum vitae should include:

- a) the candidate's professional experience;
- b) the candidate's employment history, starting with the present (in months/years), and including a brief description of each role;
- c) the candidate's education, including the field of study, memberships, publications, certification and training;
- d) the candidate's language capabilities or proficiency for each of the two (2) official languages of Canada (i.e. English and French).

## M.2 Fieldwork Manager– Sample Projects

The bidder must demonstrate the experience of each of the proposed fieldwork managers in the following way. The bidder must submit two (2) quantitative telephone surveys that each fieldwork manager has produced and completed\* in Canada in the two (2) years preceding the bid closing date. The samples submitted will be evaluated in the Point Rated Technical Evaluation *R.4 – Fieldwork Manager – Sample Projects*. Please use the sample project format in R.4 to submit sample projects.

**\*Completed** is defined as when the final data was submitted to the client.

At least one (1) of the two (2) projects submitted must include a tracking telephone survey\*\*, with multiple waves (minimum two (2)) in which a minimum of 500 respondents were contacted per wave.

**\*\*A tracking survey** is defined as asking the same target population the same set of questions at different time intervals to measure changes in responses over time. The sample for each time interval (i.e. wave) does not need to consist of the same respondents.

At least one (1) of the two (2) projects submitted must be national\*\*\* in scope, and must **demonstrate** that a final sample is representative\*\*\*\* of the target population in terms of age, gender, and region/province, based on Statistics Canada data at the time of study.

**\*\*\*National** is defined as a project being delivered in at least four (4) regions of Canada. One (1) of these regions must be Quebec. The regions are:

- British Columbia;
- Prairies (Alberta, Saskatchewan, Manitoba);
- Ontario;
- Quebec;
- Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador); and
- The Territories (Yukon, Northwest Territories, Nunavut).

**\*\*\*\* Representative** is defined as a final sample proportion that is +/-2% of the population proportion.

Table M.2: Sample table to demonstrate population and final sample proportions:

Region	Gender	Age	Population Proportion	Sample Proportion <sup>†</sup>
(Region 1)	Male	(Age category 1)	x%	x%
	Female	(Age category 1)	x%	x%
	Male	(Age category 2)	x%	x%
	Female	(Age category 2)	x%	x%
	...	...		
(Region 2)	Male	(Age category 1)	x%	x%
	Female	(Age category 1)	x%	x%

Region	Gender	Age	Population Proportion	Sample Proportion <sup>†</sup>
	Male	(Age category 2)	x%	x%
	Female	(Age category 2)	x%	x%
	...	...		
(Region 3)	Male	(Age category 1)	x%	x%
	Female	(Age category 1)	x%	x%
	Male	(Age category 2)	x%	x%
	Female	(Age category 2)	x%	x%
	...	...		
(Region 4)	Male	(Age category 1)	x%	x%
	Female	(Age category 1)	x%	x%
	Male	(Age category 2)	x%	x%
	Female	(Age category 2)	x%	x%
	...	...		
...				

<sup>†</sup>Sample proportion should be based on weighted data, if applicable.

### M.3 Fieldwork Firm / Sub-Contractors

All fieldwork must be completed in Canada. The bidder must identify whether all fieldwork will be conducted with either:

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

If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the contract unless authorized in writing by Public Works and Government Services Canada.

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

- the name of the sub-contractor; and
- the number of years in business.

### M.4 Fieldwork Firm / Sub-Contractor – Project Samples

The bidder must submit a minimum of three (3) but no more than five (5) quantitative telephone surveys completed in Canada by the fieldwork firm / sub-contractor identified in M.3. At a minimum, one (1) project must be a tracking survey, with at least two (2) waves in which a minimum of 500 respondents were contacted per wave. The samples will be evaluated in the Point Rated Technical Evaluation R.5 – *Fieldwork Firm / Sub-Contractor's Experience*.

## M.5 Financial Proposal / Basis of Payment

The bidder must provide rates for the initial contract period and each of the option periods in accordance with Annex "B2" - Basis of Payment, Pricing – Quantitative Surveys.

**BIDDERS NOT MEETING ALL OF THE MANDATORY TECHNICAL EVALUATION CRITERIA WILL BE GIVEN NO FURTHER CONSIDERATION.**

## 2. POINT RATED TECHNICAL EVALUATION CRITERIA

In addition to meeting all of the mandatory technical evaluation criteria, bidders must achieve the minimum passing marks in each Rated Requirements section of the Technical Evaluation to be considered responsive. Bids that fail to meet the minimum points will not be evaluated further and will be considered non-responsive.

### R.1: Understanding the Requirement (Minimum 35, Maximum 50 points):

The bidder should provide a narrative summary that reflects their understanding of the Statement of Work. Simply repeating the Statement of Work, in whole or in part, does not indicate an understanding of the project's aims and objectives or the ability to carry it out.

Points	Rating Level
Not Met (0 points)	<b>Not provided.</b>
Weak (50% of points)	The bidder demonstrates <b>minimal</b> understanding of the Statement of Work. Elements are missing or unclear.
Met (70% of points)	The bidder <b>clearly</b> demonstrates an understanding of the Statement of Work. Their summary includes proposed approach, methodology, and discussion of challenges and difficulties anticipated.
Exceeded (100% of points)	The bidder provides a <b>clear and detailed</b> understanding of the Statement of Work. Their summary includes proposed approach, methodology, and discussion of challenges and difficulties anticipated. In addition, the bidder has provided a rationale for the proposed approach and methodology and has provided possible solutions to each of the challenges and each of the difficulties anticipated.

### R.2: Methodology (Minimum 350 points - Maximum 500 points)

The bidder should provide a complete description of the methodology and research procedures, including data collection techniques; bidders should demonstrate how they will achieve the completions required by describing the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates, and the procedures they intend to follow to obtain the required

number of completions. In the evaluation of bidders' proposals, points will be allocated to sampling and method to locate telephone numbers of eligible respondents.

The following rated criteria will be used for evaluation:

Criterion	Percentage (%)	Points
<b>Section I: Methodology and Research Procedures</b> The degree to which the bidder describes the methodology, including the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates, and the procedures they intend to follow to obtain the required number of completions.		/200
<b>Section II: Data Collection Capability and Quality Control</b> The degree to which the bidder describes the data collection capability and all quality control mechanisms that will be in place to ensure the reliability and validity of the results.		/150
<b>Section III: Addressing Issues and Challenges</b> The degree to which the bidder describes the rationale for the approach and a description of potential challenges/problems that could arise and how each will be addressed.  This should include margin of error, non-response bias, urban/rural/provincial /... sampling issues, extrapolation to the population, etc.		/150
<b>TOTAL POINTS</b>		

Points	Rating Level for Sections I, II, III
Not met (0 points)	<b>Not provided.</b>
Weak (50% of points)	Bidder demonstrates <b>minimal</b> understanding of the requirements. Elements are missing or unclear.
Met (70% of points)	Bidder <b>clearly</b> demonstrates an understanding of the requirements.
Exceeded (100% of points)	Bidder provides a <b>clear and detailed</b> understanding of the requirements. Their summary includes all elements. In addition, the bidder has provided a rationale for each proposed idea.

**R.3: Fieldwork Manager – Qualifications (Minimum 105 points, Maximum 150 points):**

The curriculum vitae of each fieldwork manager proposed in M.1 will be evaluated as follows:

- a) **Academic qualifications / training / certifications / publications / awards and memberships** relevant to public opinion research fieldwork management, including communication of survey pre-test and results.

**(Minimum 35 points, Maximum 50 points)**

If more than one (1) fieldwork manager is included, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

		<b>Academic Qualifications</b>								
<b>Name of Fieldwork Manager</b>	High School (30 points) College – not relevant* (35 points) College – relevant* (39 points) University – not relevant* (44 points) University – relevant* (47 points)					<b>Certifications / Training</b>  (Accreditations, certifications, etc. Courses, Workshops, Seminars, Conferences)	<b>Publications</b>  (Academic papers, professional association articles, reports, etc. Fieldwork manager must clearly be identified as an author/co-author)	<b>Awards and Memberships</b>  (i.e.: Marketing Research Intelligence Association, etc.)		<b>Total Points</b>
	/30 pts	/35 pts	/39 pts	/44 pts	/47 pts					
<b>Total Points</b>										
<b>Final Score</b> (average points for all fieldwork managers)										

\*Relevant = specialization/major in disciplines such as: social sciences, economics, and statistics.

- b) **Work experience** –the bidder should provide the total number of years of relevant experience for each proposed fieldwork manager.

**(Minimum 70 points, Maximum 100 points)**

If more than one (1) fieldwork manager is included, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

Name of Fieldwork Manager	Number of years overall of relevant experience					Total Points
	Less than 5 years 60 points	Equal to 5 years but less than or equal to 6 years 70 points	Greater than 6 years but less than or equal to 7 years 80 points	Greater than 7 years but less than or equal to 8 years 90 points	Greater than 8 years 100 points	
<b>Total Points</b>						
<b>Final Score</b> (average points for all fieldwork managers)						

**R.4: Fieldwork Manager –Sample Projects (Minimum 70 points - Maximum 100 points)**

The two (2) projects submitted under mandatory requirement M.2 will be evaluated under this point rated evaluation. Bidders are requested to use the following PROJECT SAMPLE FORMAT for each project submitted:

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

**PROJECT SAMPLE FORMAT**

**SECTION I: BACKGROUND INFORMATION (5 points)**

Project Title:  
Client Name:  
Delivery Dates of Final Data/Report:  
Fieldwork Location(s):  
Sample Size per Wave:

Attestation: The bidder should submit a brief attestation of performance signed by the client for each project submitted. The attestations should clearly reference the specific project and state that the work was conducted to the satisfaction of the client. A client attestation template is included as Appendix "G".

**SECTION II: PROJECT BACKGROUND (15 points)**

Describe your client's requirement, challenge, or opportunity and what your company was hired to do. Include a description of the product/service/social issue and the target audience(s).

**SECTION III: METHODOLOGY (30 points)**

Provide a summary of the methodology and describe how it responded to your client's objectives.

If more than one (1) fieldwork manager is included, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

Name of Fieldwork Manager	Project # 1 (Maximum 50 points)				Project # 2 (Maximum 50 points)				Total Points
	S.I (5)	S.II (15)	S.III (30)	TOTAL (50)	S.I (5)	S.II (15)	S.III (30)	TOTAL (50)	
<b>Total Points</b>									
<b>Final Score</b> (Average points for all fieldwork managers)									

Points	Rating Level for Sections I, II, III
Not met (0 points)	Information is <b>not provided</b> .
Weak (50% of points)	<b>Minimal</b> information provided. Elements are missing or unclear.
Met (70% of points)	Information <b>clearly</b> provided.
Exceeded (100% of points)	Information provided is <b>clear and detailed</b> .

**R.5: Fieldwork Firm / Sub-Contractors – Experience (Minimum 175 points - Maximum 250 points)**

The bidder should identify and describe in detail a minimum of three (3) but no more than five (5) quantitative telephone surveys completed in Canada by the fieldwork firm / sub-contractors identified in M.3. Each project will have been completed in Canada with a minimum of one thousand (1000) survey completions using random digit dialing and involving a minimum survey duration of five (5) minutes. The projects cited in M.2 and M.4 can be resubmitted for this rated criterion provided they meet all the elements required in R.5. Relevant projects conducted for clients in or outside the Government of Canada will be given equal weight in the evaluation process.

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

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

- Project title;

- Fieldwork start and end dates (Month/Year). For tracking projects, this should include the start and end dates of each wave;
- Client name and telephone number;
- Methodology including:
  - the number of survey completions and characteristics of respondents;
  - questionnaire duration;
  - sample design; and
  - the number of overall completions, and completions per wave.

Project experience will be evaluated based on the following criteria:

- a) **Recency of the Project:** The project fieldwork was completed in the two (2) years preceding the bid closing date by the bidder's proposed fieldwork firm. **(Minimum 84 points, Maximum 120 points)**

a) Recency of the Project	Project 1 Yes/No	Project 2 Yes/No	Project 3 Yes/No	Project 4 Yes/No	Project 5 Yes/No	Total points assigned (Maximum 120 points)
(Name of fieldwork firm)						
(Name of fieldwork firm)						
(Name of fieldwork firm)						

1 Project	2 Projects	3 Projects	4 Projects	5 Projects
48 points	66 points	84 points	102 points	120 points

- b) **Sample Size and Questionnaire Duration:** There were a) at least one thousand (1000) survey completions using probability sampling and b) involving minimum survey duration of at least five (5) minutes. **(Minimum 56 points, Maximum 80 points)**

b) Sample Size and Questionnaire Duration	Project 1 Yes/No	Project 2 Yes/No	Project 3 Yes/No	Project 4 Yes/No	Project 5 Yes/No	Total points assigned (Maximum 80 points)
(Name of fieldwork firm)						
(Name of fieldwork firm)						

(Name of fieldwork firm)						
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<b>1 Project</b>	<b>2 Projects</b>	<b>3 Projects</b>	<b>4 Projects</b>	<b>5 Projects</b>
<b>32 points</b>	<b>44 points</b>	<b>56 points</b>	<b>68 points</b>	<b>80 points</b>

c) **Sampling Distribution:** a) national in scope and b) the final sample is representative of the target population by region/province (**Minimum 35 points, Maximum 50 points**)

<b>c) Sampling Distribution</b>	<b>Project 1</b>	<b>Project 2</b>	<b>Project 3</b>	<b>Project 4</b>	<b>Project 5</b>	<b>Total points assigned</b>
	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>Yes/No</b>	<b>(Maximum 50 points)</b>
(Name of fieldwork firm)						
(Name of fieldwork firm)						
(Name of fieldwork firm)						

<b>1 Project</b>	<b>2 Projects</b>	<b>3 Projects</b>	<b>4 Projects</b>	<b>5 Projects</b>
<b>20 points</b>	<b>28 points</b>	<b>35 points</b>	<b>43 points</b>	<b>50 points</b>

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**ANNEX "D" to PART 5 - BID SOLICITATION  
FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION**

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: \_\_\_\_\_(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

**OR**

- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

**OR**

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

Solicitation No. - N° de l'invitation  
35035-165059/A  
Client Ref. No. - N° de réf. du client  
35035-165059

Amd. No. - N° de la modif.  
File No. - N° du dossier  
cy021.35035-165059

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

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**ANNEX "E"**  
**POLITICAL NEUTRALITY CERTIFICATION**

**Political Neutrality Certification**

This certification is to be submitted with the final report submitted to the Project Authority.

I hereby certify as Senior Officer of \_\_\_\_\_ that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the *Policy on Communications and Federal Identity and Directive on the Management of Communication – Appendix C – Mandatory Procedures for Public Opinion Research*. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

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35035-165059

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File No. - N° du dossier  
cy021.35035-165059

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

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**ANNEX "F"**  
**PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST**

Public Opinion Research Final Report Checklist:  
<http://www.tpsgc-pwgsc.gc.ca/rop-por/lvfp-or-porfrc-eng.html>

Solicitation No. - N° de l'invitation  
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Client Ref. No. - N° de réf. du client  
35035-165059

Amd. No. - N° de la modif.  
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cy021.35035-165059

Buyer ID - Id de l'acheteur  
cy021  
CCC No./N° CCC - FMS No./N° VME

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**ANNEX "G"**  
**ATTESTATION SAMPLE**

Name of contractor: \_\_\_\_\_

Project title: \_\_\_\_\_

I, \_\_\_\_\_, certify that the contractor performed the services to my satisfaction for the above noted project.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date