



RETURN BIDS TO:

Employment and Social Development Canada (ESDC)

Attention:

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Chief Financial Officer Branch
Employment and Social Development Canada
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nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Title: Tackling Poverty Together Project	
Solicitation No. 100007447	Date September 26, 2016
Solicitation Closes October 31, 2016 @ PM / 14 h	Time Zone EDT
Address Inquiries to : nc-solicitations-gd@hrsdc-rhdcc.gc.ca Size limit – 13MB	

REQUEST FOR PROPOSAL

Proposal To: Employment and Social Development 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 thereof.

Instructions : See Herein

Vendor / Firm name and address :	
Telephone:	
E-Mail:	
Name and title of person authorized to sign on behalf of Vendor/firm (type or print)	
Signature	Date



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PART 1 - GENERAL INFORMATION



1. Introduction

The Annexes include the Statement of Work and the Security Requirements Checklist

- 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;
- Part 6** Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7** Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

2. Summary

Tackling Poverty Together Project

The Tackling Poverty Together Project is an analytical research project in support of the broader Government of Canada Poverty Reduction Strategy. The Project will involve case studies of six communities across Canada that have identified poverty as an issue in order to assess the impact of poverty reduction programs locally in communities, based on the opinions of citizens including persons with lived experience of poverty.

3. Debriefings

After contract award, 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 of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS



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 (2015-07-03) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation, with the exception of the following:

1. Replace references to 'Public Works and Government Services Canada' with '**Employment and Social Development Canada**';
2. Delete Section 02, Procurement Business Number, in its entirety;
3. Revise Subsection 2d. of Section 05, Submission of Bids, to read:
"send its bid only to the physical or e-mail address specified on Page 1".
4. Subsection 5.4 of Section 05 is amended as follows:
Delete: sixty (60) days
Insert: ninety calendar (90) days
5. Delete Subsections 1a. and 1b. of Section 12, Rejection of Bid, in their entirety.
6. Delete Subsection 2. of Section 20, Further Information, in its entirety.

2. Submission of Bids

Bids must be received at the email address **nc-solicitations-gd@hrsdc-rhdcc.gc.ca** by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.

3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **5 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 questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

4. Applicable Laws

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

5. Basis for Canada's Ownership of Intellectual Property

ESDC 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:

where the Foreground consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

Canada requests that Bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

Canada requests that bidders provide their bid in two separate files, when in soft copy, as follows:

Section I: Technical Bid – 1 soft copy via e-mail

Section II: Financial Bid - 1 soft copy via e-mail

Section III: Certifications - 1 soft copy via e-mail

Prices must appear in the financial bid only.

No prices must be indicated in any other section of the bid.

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 (if applicable) 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.

All mandatory technical criteria are identified specifically with the words “shall”, “must”, or “will”. The Technical Bid must demonstrate compliance with all mandatory evaluation criteria and must also specifically respond to each of the point-rated evaluation criteria.

Section II: Financial Bid

Bidders must submit their Financial Bid in Canadian funds, in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3. The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.

Section III: Certifications

Bidders must submit the certifications required under Part 5.



Section IV: Additional Information

1.1 Bidder's Proposed Site or Premises Requiring Safeguard Measures

As indicated in Part 6 under Security Requirement, the Bidder must provide the required information below, on the Bidder's proposed site or premises for which safeguard measures are required for Work Performance.

Address:



ATTACHMENT 1 TO PART 3
Pricing Schedule

The bidder must complete this pricing schedule and include it in its Financial Bid.

Any estimated level of services specified in this pricing schedule is provided for bid evaluation price determination purposes only. Levels of efforts are provided as estimates only, and must not be construed as a commitment by ESDC to respect those estimates in any resulting contract.

No.	Resource Category or Description	Estimated Level of Effort (no. of days/hours)	Firm Per Diem or Firm Hourly Rate (insert either per diem or hourly)
1			\$
2			\$
3			\$
4			
Total Bid Evaluation Price (Customs duties are included and Applicable Taxes are extra)			\$

Total Bid Evaluation Price \$ _____



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

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.

1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Annex "B".

1.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars - applicable taxes excluded.

2. Basis of Selection

See the table below for the methodology to be applied to obtain final ratings.

The basis of selection will be the highest **combined rating of technical merit and price**:

- A minimum score is required in each of the technical and management sections of the proposal ratings. Proposals that do not meet the minimum score in either of these sections will not be considered for contract award. **See next section for the evaluation criteria (technical and management criteria)**
- The compliant bidder with the highest combined rating of technical merit (combination of technical and management criteria) (**weighted at 80%**) price (**weighted at 10%**) and percentage of price quoted retained in by NGOs and/or academics (**weighted at 10%**) shall be selected as the preferred Contractor to carry out the contract. The percentage to be retained by NGOs and/or academics must be more than a simple estimate. It must be detailed and fully attributed.
- See the table below for the methodology to be applied to obtain final ratings.

Example of Best Value Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Merit Points	91	88	80
Price Quoted (not including applicable taxes)	\$1,100,000	\$800,000	\$1,000,000
Percentage of Price	3%	6%	4%



Quoted Retained by NGOs and /or academics (percentage applies to money retained by NGOs and/or academics based on the amount the Contractor spends in each community)				
Calculation				
	Technical Points	Rated Price Points	Percentage Price Retained by NGOs and/or academics	Total Points
Bidder 1	$\frac{91}{* 91} \times 80 = 80.00$	$\frac{**800,000}{1,100,000} \times 10 = 7.27$	$\frac{3}{6***} \times 10 = 5$	92.27
Bidder 2	$\frac{88}{* 91} \times 80 = 77.36$	$\frac{**800,000}{800,000} \times 10 = 10.00$	$\frac{6}{6***} \times 10 = 10$	97.36
Bidder 3	$\frac{80}{* 91} \times 80 = 70.32$	$\frac{**800,000}{1,000,000} \times 10 = 8.00$	$\frac{4}{6***} \times 10 = 6.66$	84.98
<p>* Represents the highest technical score ** Represents the lowest priced proposal *** Represents the highest percentage of price quoted retained by NGOs and/or academics</p>				

Assumption: Three valid bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score, lowest price proposal, and highest percentage of price quoted retained by NGOs and/or academics received “full rated” percentage and other proposals are pro-rated accordingly.

The winner is the bidder scoring the highest total points established by adding the three scores from each category together. Based on the above calculation, a contract would be awarded to Bidder 2, who attained the highest total score taking into consideration the technical merit and proposed price.

- Final awards will be decided by the Project Authority upon completion of the review process. All bidders will be informed of the decision.



Assumption: Three valid bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest price proposal received “full rated” percentage and other proposals are pro-rated accordingly.

The winner is the bidder scoring the highest total points established by adding the points for proposal and price. Based on the above calculation, a contract would be awarded to Bidder 2, who attained the highest total score taking into consideration the rating of proposal and proposed price.



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. 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 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 with this request will render the bid non-responsive or will constitute a default under the Contract.

1. Mandatory Certifications Precedent to Contract Award

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 so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement.

Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

1.1 Declaration of Convicted Offences

If requested by the Contracting Authority, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide a completed Declaration Form (<http://www.tpsgc-pwgsc.gc.ca/ci-if/formulaire-form-eng.html>), to be given further consideration in the procurement process.

Integrity Provisions – List of Names

Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder.

Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).

Bidders bidding as societies, firms or partnerships do not need to provide lists of names.

1.2 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



(http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from Human Resources and Social Development Canada (ESDC) - Labour's website

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

1.3 Former Public Servant Certification

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

* Bidder (For greater clarity, the “Bidder” means the vendor legal entity (e.g. not a resource of the vendor legal entity).

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

1.4 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.

If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience.



The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

1.5 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.



PART 6 – SECURITY

Security Requirement

At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Annex B;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement as indicated in Annex B;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.
- (d) the Bidder's proposed location of work performance or document safeguarding must meet the security requirement as indicated in Annex B;
- (e) the Bidder must provide the address(es) of proposed location(s) of work performance or document safeguarding as indicated in Part 3 - Section IV Additional Information.
 - In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.



PART 7 - RESULTING CONTRACT CLAUSES

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

1. Applicable Laws

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

2. 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 General Conditions 2035 - Higher Complexity - Services (2015-07-03);
- (c) Annex "A", Statement of Work;
- (d) Annex "B", Evaluation Criteria);
- (e) Annex "C", Security Requirements Check List (if applicable);
- (f) the Contractor's bid dated _____,

3. Statement of Work

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

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

Whenever 'Public Works and Government Services Canada' appears in any of the standard clauses or the General or Supplemental Conditions replace with "Employment and Social Development Canada".

4.1 General Conditions

2035 (2015-07-03), General Conditions - Higher Complexity - Services, apply to and form part of the Contract, with the following exceptions:

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 12, sub-section 2.a
- 4.1.2 Delete sub-sections 14
- 4.1.3 Delete sub-sections 15
- 4.1.4 Delete sub-sections 19



4.1.5 Delete sub-sections 20

5. Security Requirement

5.1 Contractor's Site or Premises Requiring Safeguard Measures

The Contractor must diligently maintain up-to-date, the information related to the Contractor's site or premises, where safeguard measures are required in the performance of the Work, for the following addresses:

Address:

6. Period of the Contract

The period of the Contract is from _____ (fill in start date of the period) to _____ inclusive (fill in end date of the period).

7. Authorities

7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____ Title: _____
Employment and Social Development Canada
Procurement and Contracting

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.

7.2 Project Authority

The Project Authority for the Contract is:

To be provided at time of Contract award

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.

7.3 Contractor's Representative

The Contractor's Representative for the Contract is:



To be provided at time of Contract award

8. Payment

8.1 Basis of Payment – Firm Lot Price(s)

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm lot price” of \$ _____ plus applicable taxes.

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.

9. Method of Payment

9.1 Milestone Payments

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

10. Invoice Submission

1. Invoices must be submitted in the Contractor's name. The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
2. Invoices must show:
 - the date, the name and address of the client department, item or reference numbers, deliverable / description of the Work, contract number, and financial code(s);
 - details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;
 - deduction for holdback, if applicable;
 - the extension of the totals, if applicable; and
 - if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.



3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.

By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

10.1. T1204 Information Reporting by Contractor

1. Pursuant to paragraph 221 (1)(d) of the Income Tax Act, R.S. 1985, c.1 (5th Supp.), payments made by departments and agencies to contractors under applicable services contracts (including contracts involving a mix of goods and services) must be reported on a T1204 Government Service Contract Payments slip.

11. Foreign Nationals (Canadian Contractor)

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

12. 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

13. Certifications

13.1 The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated 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 associated 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.

14. Intellectual Property

Crown to Own the Intellectual Property Rights in Foreground Information;

- **01** Interpretation
- **02** Disclosure of Foreground Information



- **03** Canada to Own Intellectual Property Rights in Foreground Information
- **04** License to Intellectual Property Rights in Background Information
- **05** Right to License
- **06** Access to Information; Exception to Contractor Rights
- **07** Waiver of Moral Rights
- Copyright (Re: 6.5)

01 Interpretation

1. In the Contract,

"Background Information" means all Technical Information that is not Foreground Information and that is proprietary to or the confidential information of the Contractor, its Subcontractors or any other supplier of the Contractor;

"Firmware" means any computer program stored in integrated circuits, read-only memory or other similar devices;

"Foreground Information" means any Invention first conceived, developed or reduced to practice as part of the Work under the Contract and all other Technical Information conceived, developed or produced as part of the Work under the Contract;

"Intellectual Property Right" means any intellectual property right recognized by the law, including any intellectual property right protected through legislation (such as that governing patents, copyright, industrial design, integrated circuit topography, or plant breeders' rights) or arising from protection of information as a trade secret or as confidential information;

"Invention" means any new and useful art, process, machine, manufacture or composition of matter, or any new and useful improvement in any art, process, machine, manufacture or composition of matter, whether or not patentable;

"Software" means any computer program whether in source or object code (including Firmware), any computer program documentation recorded in any form or medium, and any computer database, and includes modifications to any of the foregoing;

"Technical Information" means all information of a scientific, technical or artistic nature relating to the Work, whether oral or recorded in any form or medium and whether or not subject to copyright, including but not limited to any Inventions, designs, methods, processes, techniques, know-how, models, prototypes, patterns, samples, schematics, experimental or test data, reports, drawings, plans, specifications, photographs, collections of information, manuals and any other documents, and Software. Technical Information does not include data concerned with the administration of the Contract by Canada or the Contractor, such as internal financial or management information, unless it is a deliverable under the Contract.



02 Disclosure of Foreground Information

1. The Contractor shall promptly report and fully disclose to the Minister all Foreground Information that could be Inventions, and shall report and fully disclose to the Minister all other Foreground Information not later than the time of completion of the Work or at such earlier time as the Minister or the Contract may require.
2. Before and after final payment to the Contractor, the Minister shall have the right to examine all records and supporting data of the Contractor which the Minister reasonably deems pertinent to the identification of Foreground Information.

03 Canada to Own Intellectual Property Rights in Foreground Information

1. Without affecting any Intellectual Property Rights or interests therein that have come into being prior to the Contract, all Intellectual Property Rights in the Foreground Information shall immediately, as soon as they come into existence, vest in and remain the property of Canada. The Contractor shall have no right in or to any such Intellectual Property Rights in the Foreground Information except any right that may be granted in writing by Canada.
2. The Contractor shall incorporate the copyright symbol and either of the following copyright notices, as appropriate, into all Foreground Information that is subject to copyright, regardless of the form in or medium upon which it is recorded:

(c) HER MAJESTY THE QUEEN IN RIGHT OF CANADA (year)

or

(c) SA MAJESTÉ LA REINE DU CHEF DU CANADA (year)
3. (i) For greater certainty, the Contractor agrees that where the Work under the Contract involves the preparation of a database or other compilation using information or data supplied by Canada or personal information referred to in paragraph (ii), then the Contractor shall not use or disclose any such information or data or personal information for any purpose other than completing the Work under the Contract. The Contractor shall not dispose of such information or data or personal information except by returning it to Canada. The Contractor shall comply with the General Conditions of the Contract in regard to maintaining the confidentiality of such information, data, or personal information. Unless the Contract otherwise expressly provides, the Contractor shall deliver to Canada all such information, data, or personal information, together with every copy, draft, working paper and note thereof that contains such information, data, or personal information upon completion or termination of the Contract or at such earlier time as the Minister may require.

(ii) For greater certainty and without limiting sub-section 03(1), if the Work under the Contract involves the collection of personal information as that term is defined in the Privacy Act (R.S.C., c. P-21), then all Intellectual Property Rights in and title to that personal information shall, immediately upon the collection of it by the Contractor, vest in Canada, and the Contractor shall have no right or interest in it.
4. The Contractor shall execute such conveyances or other documents relating to the Intellectual Property Rights in the Foreground Information as the Minister may require, and the Contractor



shall, at Canada's expense, afford the Minister all reasonable assistance in the preparation of applications and in the prosecution of any applications for registration of any Intellectual Property Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.

04 License to Intellectual Property Rights in Background Information

1. The Contractor hereby grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in any Background Information incorporated into the Work or necessary for the performance of the Work as may be required for the following purposes:
 - i. for the use, operation, maintenance, repair or overhaul of the Work;
 - ii. in the manufacturing of spare parts for maintenance, repair or overhaul of any custom part of the Work by Canada if those parts are not reasonably available to enable timely maintenance, repair or overhaul;
 - iii. for disclosure to any contractor engaged by Canada (or bidder for such a contract) to be used solely for a purpose set out in paragraph (a) or (b), but only if the Contractor is unable or unwilling to carry out the maintenance, repair or overhaul or provide the spare parts on reasonable commercial terms and within reasonable delivery times;

and the Contractor agrees to make any such Background Information (including, in the case of Software, source code) promptly available to Canada for any such purpose.

2. The Contractor hereby further grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in the Background Information incorporated into the Work or necessary for the performance of the Work as are necessary in order for Canada to modify, improve or further develop the Foreground Information. Canada's rights under this subsection 2 shall not include the right to reproduce the whole or part of any deliverable under the Contract that does not incorporate Foreground Information, save that Canada may reproduce any drawings, plans, designs, or other Background Information that are subject to copyright or industrial design protection, for purposes of modification, improvement or further development of the Foreground Information by or for Canada. The Contractor agrees to make any such Background Information (including, in the case of Software, source code) promptly available to Canada for any such purpose.
3. Notwithstanding subsections 1 and 2, the license set out therein shall not apply to any Software that is subject to detailed license conditions that are set out elsewhere in the Contract.
4. The Contractor acknowledges that, subject to paragraph (c) of subsection 1, Canada may wish to award contracts for any of the purposes contemplated in subsections 1 and 2 and that such contract awards may follow a competitive process. The Contractor agrees that Canada's license in relation to the Intellectual Property Rights in Background Information includes the right to disclose the Background Information to bidders for such contracts, and to sub-license or otherwise authorize the use of that information by any contractor engaged by Canada solely for the purpose of carrying out such a contract. Canada shall require bidders and the contractor not to use or disclose any Background Information except as may be necessary to bid for or to carry out that contract.



5. Where the Intellectual Property Rights in any Background Information are owned by a Subcontractor at any tier, the Contractor shall either obtain a license from that Subcontractor that permits compliance with subsections 1 and 2 or arrange for the Subcontractor to convey directly to Canada the same rights by execution of the form provided for that purpose by the Minister, in which case the Contractor shall deliver that form to the Minister, duly completed and executed by the Subcontractor, no later than the time of disclosure to Canada of that Background Information.

05 Right to License

The Contractor represents and warrants that the Contractor has, or the Contractor undertakes to obtain, the right to grant to Canada the license to exercise the Intellectual Property Rights in the Background Information as required by the Contract.

06 Access to Information; Exception to Contractor Rights

1. Subject to the Access to Information Act, R.S.C., c. A-1 and to any right of Canada under the Contract, Canada shall not release or disclose outside the Government of Canada any Background Information delivered to Canada under the Contract that is confidential information or a trade secret of the Contractor or a Subcontractor.
2. Nothing in these terms and conditions shall be construed as limiting Canada's right to exercise the Intellectual Property Rights in any Background Information, or to disclose any Background Information, to the extent that such information:
 1. is or becomes in the public domain, or to the extent that the Contractor does not benefit from or ceases to benefit from any intellectual property rights protection for such information under legislation or at law (other than under the terms of the Contract), for any reason including as a result of Canada's use or disclosure of deliverables under the Contract for any purpose whatever that is not expressly excluded under the Contract;
 2. is or becomes known to Canada from a source other than the Contractor, except from any source that is known to Canada to be under an obligation to the Contractor not to disclose the information;
 3. is independently developed by or for Canada; or
 4. is disclosed under compulsion of a legislative requirement or any order of a court or other tribunal having jurisdiction.

07 Waiver of Moral Rights

1. The Contractor shall provide to Canada, at the completion of the Work or at such other time as the Minister may require, a written permanent waiver of moral rights (as that term is defined in the Copyright Act, R.S.C., c. C-42), in a form acceptable to the Minister, from every author that contributed to any Foreground Information which is subject to copyright protection and which is deliverable to Canada under the terms of the Contract.



2. If the Contractor is an author of the Foreground Information referred to in subsection 1, the Contractor hereby permanently waives the Contractor's moral rights in that Foreground Information.

Copyright (Re: 6.5)

Copyright

1. In this section,
"Material" means anything that is created or developed by the Contractor as part of the Work under the Contract, and in which copyright subsists, but does not include computer programs and related software documentation.

"Moral Rights" has the same meaning as in the Copyright Act, R.S.C. 1985, c. C-42.
2. Copyright in the Material shall vest in Canada and the Contractor shall incorporate in all Material the copyright symbol and either of the following notices, as appropriate:

(c) HER MAJESTY THE QUEEN IN RIGHT OF Canada (year)

or

(c) SA MAJESTÉ LA REINE DU CHEF DU CANADA(year)
3. At the completion of the Contract, or at such other time as the Contract or the Minister may require, the Contractor shall fully and promptly disclose to the Minister all Material created or developed under the Contract.
4. Where copyright in any Material vests in Canada under the Contract, the Contractor shall execute such conveyances and other documents relating to title or copyright as the Minister may require.
5. The Contractor shall not use, copy, divulge or publish any Material except as is necessary to perform the Contract.
6. At the request of the Minister, the Contractor shall provide to Canada, at the completion of the Work or at such other time as the Minister may require, a written permanent waiver of Moral Rights, in a form acceptable to the Minister, from every author that contributed to the Material.
7. If the Contractor is an author of the Material, the Contractor hereby permanently waives the Contractor's Moral Rights in respect of the Material.



ANNEX “A”

Statement of Work

Title:

Request for Professional Services to Run Employment and Social Development Canada’s (ESDC) Tackling Poverty Together Project

Objectives:

The Tackling Poverty Together Project (herein after referred to as The Project) is an analytical research project in support of the broader Government of Canada Poverty Reduction Strategy. The Project will involve case studies of six communities across Canada that have identified poverty as an issue in order to assess the impact of poverty reduction programs locally in communities, based on the opinions of citizens including persons with lived experience of poverty.

The Contractor will engage with local stakeholders and individuals in low income to get their views on what government needs to do better to address poverty, including what has worked and what needs to be improved.

The Contractor will be responsible for conducting engagement sessions in six communities across Canada in order to hear directly from individuals with lived experience of poverty and organizations delivering poverty reduction programs. Each case study / community engagement would involve gathering qualitative and quantitative information on the impact of government programs on those living in poverty, barriers to accessing the programs, and ideas to improve existing programs. As part of gathering qualitative and quantitative information, the Contractor must:

- Employ qualitative research tools and methods (e.g. use of focus groups, roundtables – see Proposed Methodology and Deliverables); and
- Produce and undertake a quantitative survey to solicit views on poverty and government programming to reduce poverty in each of the six communities (standard of error +/- 5%).

Once completed, the Contractor must provide an analysis of the data that will then be included in the final report as well as other analytical appendices to the final report (e.g. tables, graphs etc.)

Contract Period:

Date of award to June 30, 2017.

The contract period will begin upon awarding / signature of the contract, expected November 2016. Three of six communities must be completed by March 31, 2017. All six case studies must be completed and the final report must be submitted and approved by the Project Authority by June 30, 2017. See Deliverables Requirements for further information on timelines.



Background, Assumptions and Scope of the Requirement:

In 2015, the Minister of Families, Children and Social Development was mandated with leading the development of a Canadian Poverty Reduction Strategy.

To inform the development of the Poverty Reduction Strategy, the Government of Canada intends to implement The Project as a means of gathering information on opinions and testimonials, at the community level, of government programming aimed at poverty reduction.

Requirements:

Overview

The Project will involve conducting qualitative and quantitative research case studies in six communities across Canada to allow for a regional perspective and a broader understanding of poverty in communities across Canada.

The six communities are:

1. Saint John, New Brunswick;
2. Trois-Rivières, Québec;
3. Regent Park, Toronto, Ontario;
4. Winnipeg, Manitoba;
5. Yellowknife, Northwest Territories; and
6. Tisdale, Saskatchewan.

The following are proposed themes that the Project would examine:

- Impacts of federal poverty reduction initiatives from the perspective of people with lived experience of poverty (e.g. Canada Child Benefit, Guaranteed Income Supplement, Old Age Security, Homelessness Partnering Strategy, Canada Learning Bond etc.);
- The views of individuals on the cumulative impact of federal poverty reduction initiatives;
- The views of individuals on the interaction between federal poverty reduction programs and programs at other levels of government;
- Opinions on what could be done differently or improved;
- Key challenges faced by people with lived experience of poverty; and
- Areas where people with lived experience of poverty need greater support.

Proposed Methodology

This section provides general guidance on proposed elements of The Project. The Contractor would be expected to incorporate this approach while also providing advice on the most effective mix of tools to obtain a better understanding of the challenges with respect to poverty at the local level, including persons with lived experience of poverty and community organization perspective.



In addition, the Contractor **must work with local non-governmental organizations (NGOs) and/or academics in each community in the implementation of the Project.** This could include the development of the engagement sessions, identification of participants for focus groups, and compilation and analysis of results and must include financial remuneration for their involvement. Further detail on this requirement is specified in “Deliverables”.

Furthermore, the Tackling Poverty Together case studies are intended to be tri-partite in nature. Therefore the selected Contractor will work with ESDC officials to ensure involvement of provincial and municipal officials, in addition to expected involvement of NGOs and/or academics. This involvement could include participating in meetings between the Contractor and ESDC to determine the approach and participants for each community.

Whatever methodology is employed, the Contractor must ensure that they gather qualitative and quantitative data information from a representative sample of the population, both for the specific community and the surrounding area. The Contractor is expected to identify key sub-populations that are to be included in the research. The key sub-populations should be representative and proportional to their proportion of the low-income population.

The following proposed activities **could** be used for the purposes of conducting The Project, however the Contractor can propose alternative methods as well. Whatever methods are used, **the proposal must have the qualitative and quantitative components as specified in the Objectives.**

The Contractor **could** organize focus groups and roundtables which **could** also include provincial/municipal employees to have conversations with people with a lived experience of poverty as well as the stakeholders involved in serving / supporting this population. If this option is chosen, the purpose would be to better understand the realities that people face on the ground and the impact of existing poverty reduction measures.

Focus groups

If the Contractor chooses to convene focus groups as part of its research, then it should consider:

- Ensuring focus groups composition is representative of the community and the region more generally;
- Ensuring adequate focus group participation by gender, age and population (e.g. Indigenous peoples, persons with disabilities, recent immigrants, seniors, single parents), possibly by splitting population groups into separate demographic groups, and consider reaching out to individuals who are not comfortable/able to participate in focus groups to participate in an alternative way (e.g. one-on-one interviews with people who are homeless, seniors, or other members of the community uncomfortable in and / or unable to attend in a group setting);
- Securing non-traditional facilities for venue locations (e.g. community centres, church halls, as appropriate) where participants will feel more comfortable in the space;
- Facilitating transportation, accessibility, and provision of free childcare with regard to the venue locations;
- Scheduling focus groups or interviews taking into account participants with non-standard work schedules and other obligations; and



- Using the same set of questions for each community in order to ensure consistency and comparability of data, unless the Contractor advises on a different approach (e.g. to account for the rural difference of Tisdale, Saskatchewan).

Roundtables

If the Contractor chooses to convene roundtables as part of its research, then it should consider:

- Including participants from all appropriate stakeholder organizations, service providers, and community leaders, as well as provincial and municipal officials;
- Convening one Indigenous-specific roundtable per community, with representatives of Indigenous organizations, service providers, and community leaders;
- Using the same set of questions for each community in order to ensure consistency and comparability of data, unless the Contractor advises on a different approach (e.g. to account for the rural difference of Tisdale, Saskatchewan); and
- Ensuring that simultaneous translation and bilingual documents are available, including translation in Indigenous languages, if applicable.

Surveys

The Contractor **could** develop a telephone survey which could also include online elements as long as they are statistically reliable, in order to fulfill the quantitative survey component. The target population must be the general public within the community, with consideration given to oversampling of low-income people. The overall sample and completed survey must result in a standard of error of +/-5%.

To ensure consistency and comparability of data, the core questions of the survey must be the same for all communities, although it is expected that some community-specific questions may be necessary, and must be made available in French and English. The Contractor will consult with the Project Authority as to whether there is a need for translation in Indigenous languages. If a telephone survey is used, the Contractor will also need to use another method in order to reach low-income individuals without access to a telephone and/or limited to no access to an internet survey. The alternative method could include, but not be limited to, conducting in-person interviews at community locations used by low-income individuals (e.g. a food bank).

Whatever approach is recommended for qualitative and quantitative data collection, the proposed methodology must be outlined in detail in the proposal and the subsequent Methodological Plan. This must include proposed research instruments that will be used for the qualitative and quantitative research component. Consideration should include, but not be limited to:

- Length;
- Clarity and appropriate language; and
- Ensuring that the research instruments resonate with the target audiences.

Analytical Tools

Whatever methods are used to gather information and data, the Contractor must specify the analytical tools they will use to analyze and synthesize the results and why these tools are best for the type of data



collected and the objectives of the project. This may include the use of programs such as SPSS (version 14 or later). This part of the research will be important when writing the final report, so that the research and the significance of the findings (e.g. what the results mean for Canadians and for public policy) are clearly stated.

Deliverables:

Deliverable 1: Methodological Plan

In advance of conducting The Project, the Contractor will be required to provide a detailed methodological plan outlining how they would carry out the research.

The methodological plan must include:

- A proposed quantitative survey that would be used to solicit views on poverty and government programming to reduce poverty in each of the six communities with a standard of error of +/- 5%; and
- All other proposed research instruments for both qualitative and quantitative work, including, but not limited to, questionnaires, screeners, moderator's guides, interview guides, etc.), any proposed communications material to be used in conducting the research such as advanced notice/messages/scripts, reminder notices/scripts, taglines, products, letters, or publications produced for the purpose of marketing/publicizing the research or for recruiting purposes. In addition to assessing the overall Methodological Plan, this requirement is necessary in order for the Project Authority to ensure compliance will all privacy requirements related to the proposed research plan.

In addition, the following are other aspects that must be included when conducting qualitative and quantitative research.

For the qualitative research, the Contractor must:

- Provide a rationale for the approach to the qualitative studies and a justification of the design choices proposed, particularly the rationale for decisions concerning the selection and/or exclusion of portions of the target audiences (e.g. saturate key categories of the population that the Contractor feels should be included in the research), and the appropriateness of the qualitative techniques proposed, taking into account the specific needs and characteristics of the target audiences;
- Provide details on the number of participants/interviewees including how they will be selected and recruited, research locations and facilities, duration of research sessions and schedule. The Contractor must describe the control mechanisms they will use to ensure the presence of recruited participants at research sessions.

Please note that all in-person activities will require a remuneration of \$100 per participant paid by the Contractor;



- Select locations that allow for participants to be comfortable in the setting and, where possible, allow for an additional viewing room, fitted out with a closed-circuit audio / video system setup for observation purposes. In non-traditional facilities, please outline how observers will be accommodated;
- Design and translate recruitment screeners/moderator/interview guides in English and French, and, if applicable, Indigenous language (e.g. Cree in Tisdale, Dene in Yellowknife);
- Recruit participants while adhering to Marketing Research and Intelligence Association's (MRIA's) Code of Conduct on recruitment specifications;
- Describe the methods it will use to invite respondents;
- Provide details as to how privacy considerations and issues of consent will be addressed;
- Professionally moderate focus groups / interviews in English and French as appropriate. While simultaneous translation is not feasible, it will be up to the Contractor to decide whether it is necessary to have separate sessions for English, French, and an Indigenous language (if applicable);
- Ensure proper quality control whereby all deliverables (in all languages) will be checked, edited and validated before sending to the Project Authority (this includes all memos, drafts/final reports etc.); and
- For the final report ensure that participant responses are reported as originally stated and translation appears as footnote and not in body of text. It is the responsibility of the Contractor to ensure that no personal information is made available.

For Quantitative research, the Contractor must:

- Provide an analysis plan that relates the research questions and analytical methods to the research objectives;
- Enter results and analyze the resulting interview data to create tables and coding procedures defined in consultation with the Project Authority;
- Specify any weighting required;
- Specify the expected response or participation rate (use the Marketing Research and Intelligence Association's formula);
- Specify the margin of sampling error and confidence interval;
- Specify the response rate and calculation method;
- Provide a statement as to the degree of extrapolation to a broader audience;
- Provide an analysis of non-response bias consisting of at least three variables in the survey sample with the equivalent parameters of the population, normally available from Statistics Canada;
- Provide a separate PowerPoint file containing graphical presentation of the results, including written descriptions of subgroup findings in the notes section for each



question. All graphs must be created in MS PowerPoint format and must comply with requirements for accessibility for the visually impaired. This includes:

- Creating graphs with plain white backgrounds (no corporate logos); and,
 - If using multiple colours, ensure they are sufficiently contrasting to ensure visibility for accessibility purposes (See Common Look and Feel Policy for more information: <http://www.tbs-sct.gc.ca/clf2-nsi2/index-eng.asp>, or W3C Web Content Accessibility Guidelines under “Contrast” <http://www.w3.org/TR/WCAG20/#contentdef>);
- Create and deliver a data file with all the results of the survey in SPSS format including participant responses (version 14 or later). The Contractor must ensure that the SPSS file does not contain any respondent identifiers such as name or any contact information (if applicable);
 - All quantitative deliverables are to conform to Section 15 of the Standards for the Conduct of Government of Canada Public Opinion Research - Telephone Surveys (see <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>); and
 - Provide the Project Authority with raw datasets, as data will remain the property of the Government of Canada.

Deliverable 2: Work Plan

- In addition to the methodological plan, the Contractor must provide the Project Authority with a work plan, which would outline at least the following aspects:
 - The proposed schedule and travel budget for conducting the six community tours, which clearly indicates how three of the six communities will be completed by March 31, 2017;
 - The level of effort required by the Project Manager and personnel for each of the key stages of the contract;
 - Proposed financial breakdown as to how money will be retained by NGOs and / or academics in the six communities (see Evaluation Criteria); and
 - The proposed method for partnering with local NGOs and/or academics in each community.

For this requirement, the Contractor must include at least the following information:

- A list of proposed NGO and/or academics to be employed for each community;
- Proposed activities for NGOs and/or academics to undertake, including proposed remuneration for each activity; and
- Privacy and security plan to ensure that NGOs and/or academics involved in handling protected information are properly screened as per privacy and security requirements outlined in Specifications and Standards.

Deliverable 3: Status Updates



- The Contractor will be required to provide (within one business day) the Project Authority with a verbal debrief of the first engagement session held in each community location (e.g. the first focus group or roundtable). The purpose of this debrief is to assess early lessons learned in order to prepare for subsequent engagement sessions in the community.
- Following completion of each week of case study/community engagement within each community, the Contractor must provide (within two business days) a written debrief (no less than one page, single-spaced, 12pt font) consisting of a high-level overview of the case study work, including successes, lessons learned, issues raised, and the status of the methodological approach, including the status of the quantitative survey etc.
- All meetings for verbal debriefs will take place either at the Project Authority's offices, via conference call, or video conference.
- Beyond these requirements, the Project Authority is permitted to provide further debriefs/status updates if necessary and the Contractor is permitted to check in on the project as needed as well.

Deliverable 4: Infographics

- For each community, the Contractor must produce a two-page (1 page double-sided) infographic which must include a profile of the community and related poverty issues, and then the high-level findings from the research. The infographics must include visuals and not be overly "text-heavy."

Deliverable 5: NGO and/or Academic Summary of Payments

- Following completion of work with NGOs and/or academics, the Contractor must provide a summary of payments given to NGOs and/or academics in each community.
- The summary must include, but not be limited to, providing the following:
 - The name of NGO(s) and academic(s);
 - A description of their involvement in work (e.g. recruited focus group participants, supported results analysis); and
 - The amount paid to the NGO or academic for their services.
- The total amount paid to NGOs and/or academics in each community must be at equal to or greater than the percentage of price quoted for the entire consultation activities that were to be allotted to NGOs and/or academics in each community. For example, if the Contractor quotes 3% as the amount of money that will be retained by NGOs and/or academics in each community, and then the Contractor spends \$200,000 in community X, then the total payments issued to NGOs and/or academics for their services in community X must be equal to or greater than \$6,000.

Deliverable 6: Final Report

- For the final report, the Contractor must include an executive summary (no less than 2 pages and no more than 4 pages, single-spaced, 12 point font) highlighting the background (i.e., rationale, objectives and issues addressed), methodology, and main research findings, including an analysis of findings from the six communities. The analysis of research findings should include, but not



be limited to, comparability of results across communities, and implications for Canadians and public policy. The executive summary must be written in plain language, and must also be produced as a separate document.

- The final report must take the form of a more detailed elaboration of the executive summary and the length of the final report must be no less than 20 pages and no longer than 40 pages (single-spaced, 12 point font, excluding appendices).
- While the choice of appendices is flexible, the final report must include at a minimum appendices outlining:
 - The methodology and the corresponding research results; and
 - How local NGOs and/or academics were employed in each of the six communities.
- For the methodologies appendix, the Contractor must include a description of the methodologies used and the specifications including:
 - Method of data collection (i.e., telephone, in person etc.);
 - Sample frame (sample size, sample source and sampling procedures);
 - Target population;
 - Length of questionnaire, screening guide, interview guide etc.;
 - Date of research fieldwork; and
 - Locations of fieldwork.
- The final report will remain the property of the Government of Canada and is expected to be made publicly-available by the Government of Canada via Canada.ca and shared with focus group and roundtable participants. Therefore, the final report must be written in plain language so it can be easily understood by all Canadians. This includes graphs, tables, and other visual supporting materials. The final report must be provided in both French and English (separate versions), and must comply with requirements for accessibility for the visually impaired <http://www.w3.org/TR/WCAG20/#contentdef>. The Contractor will consult with the Project Authority as to whether there is a need for translation in Indigenous languages.

Additional Requirements:

The following outlines other requirements as it relates to the contract. The Contractor must:

- Ensure a privacy notice statement and possibly a consent form is provided to participants involved in focus groups and roundtables (in consultation with the Project Authority);
- Ensure a privacy notice statement and possibly verbal consent form is provided to participants involved in telephone surveys (in consultation with the Project Authority);
- Ensure a Privacy Notice Statement and properly documented consent is provided to audio or video record participants;
- Ensure all final, publicly-released products must not contain any personal information;
- Provide a full hospitality breakdown for in-person engagement activities, which must include, but not be limited to:



- Arranging hospitality (e.g. food, drink in accordance with Government of Canada policies and directives as listed in Section 2.3)
 - Renting meeting space;
 - Ensuring meeting space is wheelchair accessible;
 - Arranging the rental of audiovisual equipment;
 - Arranging for video conferencing;
 - Arranging for a photographer/videographer;
 - Arranging for note-taking at all sessions;
 - Photocopying documents and other supporting materials and arranging for shipping to the location(s) of the consultation(s) as needed;
 - Preparing and distributing materials to participants in advance (participant kits) by mail, email or by other means (if applicable);
 - Providing on-site assistance; and
 - Providing other logistics planning services, as required.
- Provide a point of contact (Project Manager) who will be available for the duration of the project and will remain accessible by the Project Authority. The Contractor is permitted to use different personnel for different aspects of the project (e.g. the same personnel do not need to be used as facilitators for each engagement session) so long as they meet all personnel requirements as stipulated in this contract;
 - Ensure Project Authority can receive all deliverables in selected format by e-mail. Please note that Protected B information (e.g. personal information) must not be sent using regular e-mail, it must be encrypted. As per new Departmental directive, no deliverables can be transmitted by USB stick or other USB device;
 - Ensure all deliverables have been checked, edited and validated by the senior consultant before sending to the Project Authority (this includes all memos, drafts/final reports, research instruments, PowerPoint decks, etc.). Please note: documents with too many spelling or grammatical errors – as determined at the discretion of the Project Authority – will be returned to the Contractor;
 - All final, publicly-released products must not contain any personal information and must be provided in Microsoft Word 2010 format and in PDF format including all required appendices; and
 - Ensure that all final documents are translated into English/French. The Contractor will consult with the Project Authority as to whether there is a need for translation in Indigenous languages.

Deliverables and Milestone Payments:

Payments will be based on the Contractor's successful completion of key deliverables over the course of the contract. The payment will be issued upon approval of each deliverable by the Project Authority after review and edits. This schedule may be subject to change following discussions with the Contractor and after the Project Authority's approval of the Methodological Plan and Work Plan.



Deliverables	Date of Delivery	Payment
<p>Deliverable 1: Draft Methodological Plan</p> <ul style="list-style-type: none"> The Project Authority must provide revisions and comments within 5 business days of receiving the draft. <p>Final Methodological Plan</p>	<p>December 2016 Ten business days after signing of the contract</p> <p>December 2016 Five business days after receiving comments on draft</p>	<p>0%</p> <p>10%</p>
<p>Deliverable 2: Draft Work Plan</p> <ul style="list-style-type: none"> The Project Authority must provide revisions and comments within 2 business days of receiving the draft. <p>Final Work Plan</p>	<p>December 2016</p> <p>December 2016 Two business days after receiving comments on draft</p>	<p>0%</p> <p>15%</p>
<p>Deliverable 3: Status Updates</p> <ul style="list-style-type: none"> The Contractor must provide a verbal debrief within one business day following completion of the first session (e.g. focus group, roundtable) within each community. <p>The Contractor must provide a written debrief of no less than one page within two business days following completion of each week of case study/community engagement in each community.</p>	<p>December 2016-June 30, 2017</p> <p>March 31, 2017 (or before)</p> <p>June 30, 2017 (or before)</p>	<p>10% - following the first written debrief</p> <p>20% (following the written debrief concluding consultations in the third of six communities)</p> <p>20% (following the final written debrief)</p>



printing charges, office supplies, courier and long distance telephone charges, are included in the rates and will not be permitted as additional charges.

Travel Requirements (as applicable)

The Contractor will be required to travel and work onsite in six communities across Canada.

The schedule for specific case studies / community engagements in each community is at the discretion of the Contractor, so long as they meet the following requirements for scheduling:

- each community must be scheduled no less than one week apart;
- The first case study / community engagement must be launched no later than December 2016;
- Three of six communities for case study/community engagement must be completed by March 31, 2017; and
- The final case study / community engagement must be completed no later than June 30, 2017.

The Contractor will be responsible for selecting and reserving the appropriate venue location for the case study / community engagement, as well as travel arrangements to and from the location, budgeting travel, the number of personnel who will travel, and all financial arrangements with local NGOs and / or academics in each community.

Arranging hospitality, renting meeting space, and making travel arrangements must be in accordance with applicable Government of Canada policies and directives.

The Contractor will be paid for pre-authorized reasonable and proper travel and living expenses incurred by individuals directly engaged in the performance of the work, supported by appropriate receipts and calculated in accordance with the current Treasury Board Guidelines on Travel and Living Expenses Web Site:

http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/menu-travel-voyage_e.asp without allowance thereon for overhead or profit. All payments are subject to government audit.

While the Project Authority does not specify a set amount for travel, a proposed travel budget must be provided by the Contractor to the Project Authority as part of the Work Plan. Amendments will be required if the Project Authority determines that too much money is being allotted toward travel.

Miscellaneous Expenses (as applicable)

The Contractor will be paid for pre-authorized reasonable and proper miscellaneous expenses supported by receipts at actual cost without allowance thereon for overhead or profit, including but not limited to, expenses for meeting room and audio-visual equipment rentals, translation services, advertising, American Sign Language (ASL) interpretation, etc.

Project Management Control Procedures

The Project Authority will meet with the Contractor and/or review all materials submitted by the Contractor as deliverables. The Project Authority will provide comments to the Contractor indicating any changes or revisions required to the written deliverables.



The management by the Contractor of service delivery in relation to this contract must be undertaken in accordance with all applicable Acts, Codes, departmental and/or federal government regulations, policies and procedures and in accordance with best practices of the public involvement/consultation and project management fields.

The Contractor must ensure that all deployed resources are accredited and properly trained to fulfil their responsibilities. In addition, the Contractor is required to ensure that all of its assigned resources are operating at all times in accordance with all applicable legislation, regulations, codes and policies.

SPECIFICATIONS AND STANDARDS:

All services rendered and deliverables completed in response to a contract must be in compliance with all relevant departmental and Government of Canada Acts, codes, regulations and policies in effect at the time of contract.

For the purposes of this Request for Proposals, the Contractor must adhere to the following specifications and standards applicable under this contract:

- a) Policy on Communications and Federal Identity <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30683>
- b) Directive on the Management of Communications: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=30682>
- c) Policy on Government Security: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16578>
- d) Operational Security Standard: Management of Information Technology Security (MITS): <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328>
- e) Canadian Industrial Security Directorate (CISD) policies related to personnel security screening: <http://ssi-iss.tpsgc-pwgsc.gc.ca/ssi-iss/sc-cs/sc-cs-eng.html>
- f) Directive on Travel, Hospitality, Conference and Event Expenditures: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>
- g) *Official Languages Act*: <http://www.laws-lois.justice.gc.ca/eng/acts/O-3.01/>
- h) Policy on Official Languages: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26160>
- i) Directive on Official Languages for Communications and Services: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=26164>
- j) Marketing Research and Intelligence Association's Code of Conduct and Good Practice: <http://mria-arim.ca/sites/default/uploads/files/MRIACoconduct-Dec2007REV2010.pdf>
- k) The Government of Canada's Communications Policy <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316§ion=text#sec5.8>
- l) Standards for the Conduct of Government of Canada Research - Telephone Surveys <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>
- m) *Privacy Act*: <http://laws-lois.justice.gc.ca/eng/acts/P-21/>
- n) *Department of Employment and Social Development Act*: <http://laws-lois.justice.gc.ca/eng/acts/H-5.7/index.html>
- o) Policy on Privacy Protection: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12510>
- p) Directive on Privacy Practices: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=18309>

Additionally, the Contractor must abide by the following security requirements:



- The Contractor must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate, Public Services and Procurement Canada (PSPC).
- The Contractor personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC).
- The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PSPC has issued written approval. After approval has been granted or approved, these tasks may be per-formed at the level of PROTECTED B.
- Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PSPC.
- The Contractor must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable) attached at Annex C; and
 - (b) Industrial Security Manual (Latest Edition)

The Contractor must also abide by ESDC's reporting requirements as stated here:

Disclosure for Collection of Personal Information

1. For the purpose of allowing the Contractor to perform the work under the contract, ESDC may make available to the Contractor, in accordance with the *Privacy Act*, the *Department of Employment and Social Development Act* and other applicable laws governing the protection of information under its control, contact information including at a minimum the following: ESDC Client Contact information: Name; Mailing address; Telephone number; Email address.
2. For the purpose of performing the work under the contract, the Contractor shall collect, on behalf of ESDC, information such as demographic information, attitudes and opinions.
3. The Contractor shall collect the information referred to in section 2 above directly from the individuals to whom that information relates unless the individuals authorise collection from another source or the direct collection of information might result in the collection of inaccurate information.
4. The Contractor shall inform the individuals of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
5. The Contractor shall make every effort to ensure the accuracy of the information collected pursuant to section 2 above.
6. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.



7. The Contractor shall maintain all information referred to in sections 1 and 2 above, and make sure it is only accessible, in Canada.
8. The Contractor shall segregate all records containing information referred to in sections 1 and 2 above (whether in electronic format or in hard copy) from other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside Canada.
9. The Contractor shall ensure that all aspects of the processing of information referred to in sections 1 and 2 above are conducted in, and only accessible in Canada.
10. The Contractor shall take all necessary measures to ensure that every person hired, or the services of whom it retains to fulfill obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in sections 1 and 2 above.
11. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in sections 1 or 2 above, is disclosed to a third party for a purpose authorised herein, unless there is a written agreement between the Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.
12. The information referred to in sections 1 and 2 above remains at all times under the control of ESDC.
13. The information referred to in sections 1 and 2 above is protected by the *Privacy Act* and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the ESDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that ESDC may issue.
14. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in sections 1 and 2 above except with the written consent of ESDC.
15. Unless otherwise required by law or authorised in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall return to ESDC the information referred to in sections 1 and 2 above and copies thereof, if any.
16. The Contractor's premises shall be open for inspection by authorized representatives of ESDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.



17. The Contractor shall notify ESDC immediately after he becomes aware that a breach of any provision of this contract governing the protection of personal information has occurred.
18. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by ESDC.

Change Management Procedures

The Contractor must propose (in writing) any changes to the scope of work under this contract, for the consideration and agreement by the Project Authority. In identifying a suggested change, the Contractor must identify why they are recommending the change, the estimated cost of the change, and the impact on resources (Contractor and Crown) and project deliverables.

No changes will be implemented to this contract without first obtaining the approval of the Project Authority, and upon receipt of a formal amendment to the contract signed by the Contracting Authority. The Contractor must not proceed with work outside of the scope of the contract without the prior written authorization of the Contracting Authority.

Department Obligations:

The Project Authority will be responsible for coordinating the overall project, providing as-required direction and guidance to the Contractor, and accepting and approving Contractor deliverables on behalf of the department. Additionally, these departmental representatives will:

- Ensure that the appropriate subject matter and technical experts from within the department are available to the Contractor to discuss and provide content, source, and/or reference material, review deliverables, as well as to facilitate cooperation with other governmental and/or non-governmental representatives;
- Provide the Contractor with specific policy and/or program related supporting and background documentation and information not easily accessible to the Contractor, including (but not limited to) any government and departmental policies, procedures, guidelines, templates, publications, reports and studies required by the Contractor to complete the identified tasks and deliverables within each contract;
- Negotiate the number of days required for a given deliverable. The timing for each deliverable is outlined in Deliverables and Milestone Payments;
- Provide comments on draft documentation and proposals within five (5) working days, unless otherwise stated;
- Provide the Contractor with physical and electronic departmental office and e-mail addresses, where deliverables will be submitted; and
- Provide other assistance or support, as required to efficiently execute the requirements of the contract.

Contractor Obligations:

In addition to the completion of the deliverables and requirements specified in the contract, the Contractor must adhere to the following:



- Be available for the completion of all of the Contractor's responsibilities in relation to the contract;
- Ensure that the work is appropriately planned, organized, and carried out by qualified and experienced individuals;
- Complete deliverables according to the pre-defined schedules and standards as outlined in the Statement of Work in the contract;
- Provide the resource(s) named in its proposal to complete the work;
- Be capable of commencing work upon issuance of a contract;
- Be available via phone and email to discuss progress, as required.
- Complete the work in accordance with all applicable Acts, Codes, policies, guidelines, checklists and best practices, as indicated in Section 2.3 herein, and as further specified in the contract;
- Ensure that the departmental Project Authority is copied on all electronic communications related to the contract, including internal Contractor messages;
- Ensure that adequate communication exists between the Contractor and the department Project Authority and communicate, as soon as possible, should anything arise impeding the progress of the contract as planned;
- Maintain adequate data protection requirements at the level contracted, with no conflict for the duration of the contract;
- Maintain adequate security screening requirements for the Contractor's personnel and facilities, with no conflict for the duration of the contract;
- Be available to attend meetings at the Department's site and/or by teleconference as convened by the departmental Project Authority, when required;
- Be cognizant of and apply appropriate techniques, strategies and methodologies to account for and manage regional context, and to ensure an understanding of how regional disparities and content fit within the consultation activity undertaken by the Contractor; and
- Provide translation of required written materials into English or French and Indigenous language (if applicable).

The Contractor recognizes that, in the course of its work, it may be given access to confidential or proprietary information or documentation belonging to the Crown or to third parties. The Contractor must not, without the prior written permission of the Minister or applicable third parties, disclose to any other party, any such information or documentation, nor must the Contractor make use of the information or record/documentation of information for any purpose other than its duties under the contract.

The Contractor, its employees, associates, family members, and volunteers must not retain, donate, sell, dictate or transfer to anyone except the department any data or information it possesses or collects, including published material, drafts, notes, participant lists, etc.

All information and records/documentation (including machine readable copies) created, captured and/or collected during the performance of a contract will be deemed the property of the department in order for the department to fulfill its obligations under the *Access to Information Act* and *Privacy Act* and associated regulations, specifically s.4(1) of the Privacy Regulations which states:

“Personal information concerning an individual that has been used by a government institution for an administrative purpose must be retained by the institution:



- a) For at least two years following the last time the personal information was used for an administrative purpose unless the individual consents to its disposal; and
- b) Where a request for access to the information has been received, until such time as the individual has had the opportunity to exercise all his rights under the Act.”

It is expected that the data resulting from this project – with all personal identifiers removed - will eventually be made available under the open government process (open.canada.ca).

At the completion or earlier termination of its obligations under a contract, the Contractor must immediately and securely provide the department’s Project Authority with all records of information collected during the course of work under the contract, including, but not limited to:

- Correspondence;
- Memoranda;
- Plans, diagrams, drawings, pictorial or graphic work;
- Machine readable records;
- Other documentary material, regardless of physical form or characteristics and any copies thereof.

The Contractor must ensure that each of its resources who require access to such information or documentation executes a confidentiality agreement with Her Majesty before any such information or documentation is given to the resource. The Contractor must indemnify and hold harmless Canada and its ministers, parliamentary secretaries, officers, servants and/or agents against any claim, loss, damages, costs, or expenses that may be suffered by any of them or made by any third party against any of them, as a result of the Contractor’s failure to meet its obligations under this provision.

Language of Work:

As a department of the federal government, the department is required under the *Official Languages Act* to provide its services in either official language of Canada.

Specific language requirements for this contract include: English and French. The Contractor will consult with the Project Authority as to whether there is a need for translation in Indigenous languages.



ANNEX B:

Evaluation Criteria

Mandatory Requirements

The mandatory requirements listed will be evaluated on a pass / fail (i.e. compliant / non-compliant) basis. Proposals that fail to meet the mandatory requirements will be disqualified at this stage without further consideration.

Proposals must demonstrate compliance with all of the following specifications and requirements. Bidders must ensure that each criterion is addressed in sufficient depth to enable a thorough assessment while avoiding unnecessary redundancy. All requirements are specifically for the Project Manager and any personnel who will be working on the project. It is the responsibility of the Contractor to ensure any NGOs and/or academics involved in the project will meet security requirements if working with Protected B information.

Requirement Number	Description(s)	Page No. / Paragraph No.	Compliant / Not Compliant
M-1	<p>The <u>bidder</u> must hold a valid Designated Organisation Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B issued by the Canadian and International Industrial Security Division (CIISD), Public Services and Procurement Canada at time of bid closing.</p> <p>The bidder’s proposed personnel requiring access to PROTECTED information, assets or work site(s) must <u>each</u> hold a valid RELIABILITY STATUS at the level of PROTECTED B granted and approved by the Canadian and International Industrial Security Division (CIISD), Public Services and Procurement Canada at bid closing date.</p> <p>To demonstrate compliance, bidders shall provide a list of proposed individuals who will require access to Designated information, assets and sensitive work sites; their clearance levels, granted or approved by CIISD; and their birthdates. Birthdates will be used solely for security check purposes.</p>		



Requirement Number	Description(s)	Page No. / Paragraph No.	Compliant / Not Compliant
M-2	<p>The bidder MUST submit a Curriculum Vitae for each proposed personnel from the Contractor’s project team. Each Curriculum Vitae must include a summary that supports the skills/expertise being offered and how the skills and expertise pertain to the project (it must also include academic credentials).</p> <p>This requirement excludes Curriculum Vitae of NGO/academic partners.</p>		
M-3	<p>The bidder’s proposal MUST demonstrate that they can complete The Project within the budget of \$1,200,000 plus applicable taxes.</p>		
M-4	<p>Working with local NGOs and/or academics</p> <p>The bidder’s proposal MUST outline how the Contractor proposes to work with local NGOs and /or academics in each community. This MUST include a detailed plan for financial remuneration of the NGOs and/or academics.</p>		

Evaluation of Proposals

The criteria contained herein will be used by the Project Authority to evaluate each proposal. Each proposal which meets all the mandatory requirements specified above, will be evaluated and scored in accordance with the Rated Evaluation Requirements.

Rated Evaluation Requirements

The basis of selection will be the highest **combined rating of technical merit and price**:

- A minimum score is required in each of the technical and management sections of the proposal ratings. Proposals that do not meet the minimum score in either of these sections will not be considered for contract award. **See next section for the evaluation criteria (technical and management criteria)**
- The compliant bidder with the highest combined rating of technical merit (combination of technical and management criteria) **(weighted at 80%)** price **(weighted at 10%)** and percentage



of price quoted retained in by NGOs and/or academics (**weighted at 10%**) shall be selected as the preferred Contractor to carry out the contract. The percentage to be retained by NGOs and/or academics must be more than a simple estimate. It must be detailed and fully attributed.

- See the table below for the methodology to be applied to obtain final ratings.

Example of Best Value Determination				
	Bidder 1	Bidder 2	Bidder 3	
Technical Merit Points	91	88	80	
Price Quoted (not including applicable taxes)	\$1,100,000	\$800,000	\$1,000,000	
Percentage of Price Quoted Retained by NGOs and /or academics (percentage applies to money retained by NGOs and/or academics based on the amount the Contractor spends in each community)	3%	6%	4%	
Calculation				
	Technical Points	Rated Price Points	Percentage Price Retained by NGOs and/or academics	Total Points
Bidder 1	$\frac{91}{91} \times 80 = 80.00$	$\frac{**800,000}{1,100,000} \times 10 = 7.27$	$\frac{3}{6} \times 10 = 5$ 6***	92.27
Bidder 2	$\frac{88}{91} \times 80 = 77.36$	$\frac{**800,000}{800,000} \times 10 = 10.00$	$\frac{6}{6} \times 10 = 10$ 6***	97.36
Bidder 3	$\frac{80}{91} \times 80 = 70.32$	$\frac{**800,000}{1,000,000} \times 10 = 8.00$	$\frac{4}{6} \times 10 = 6.66$ 6***	84.98



- * Represents the highest technical score
- ** Represents the lowest priced proposal
- *** Represents the highest percentage of price quoted retained by NGOs and/or academics

Assumption: Three valid bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score, lowest price proposal, and highest percentage of price quoted retained by NGOs and/or academics received “full rated” percentage and other proposals are pro-rated accordingly.

The winner is the bidder scoring the highest total points established by adding the three scores from each category together. Based on the above calculation, a contract would be awarded to Bidder 2, who attained the highest total score taking into consideration the technical merit and proposed price.

- Final awards will be decided by the Project Authority upon completion of the review process. All bidders will be informed of the decision.

Rated Evaluation Requirements

PROPOSAL SELECTION CRITERIA

Your technical and management proposal will be evaluated and scored in accordance with the following criteria. It is suggested that you address each criterion in sufficient depth in your proposal.

Each criterion has a point allotment that reflects its importance in proposal submissions. The degree to which the proposal satisfies the requirement of each criterion will be assessed and a score will be assigned ranging from 0 to the total point allotment. The awarding of these points will be determined based on the following descriptions:

- Not Addressed* – the bidder has provided no information regarding the proposal requirement. 0% of the available points
- Poor* – the bidder does not demonstrate sufficient capacity to meet the basic requirements described in the proposal requirement.
1% to 49% of the available points
- Fair* – the bidder demonstrates a limited capacity to meet the basic requirements described in the proposal requirement.
50% to 64% of the available points
- Good* – the bidder demonstrates a satisfactory capacity to meet the requirements described in the proposal requirement.
65% to 79% of the available points
- Very Good* – the bidder demonstrates a capacity to fully meet the requirements described in the proposal requirement.
80% to 89% of the available points



PROPOSAL SELECTION CRITERIA

- Excellent* – the bidder demonstrates a capacity to fully meet and exceed the requirements described in the proposal requirement.

90% to 100% of the available points

The maximum possible score is 100 points.

Only those proposals that achieve a minimum score of 65 percent or higher in each of the two (2) criteria sections (Technical and Management) shall receive further consideration.



Technical Criteria:			
	55 points, minimum 35.75 points required	Max	Total
1	Demonstrated understanding of the objectives and context of the project, including understanding of the Government's mandate commitment with regard to the creation of a Poverty Reduction Strategy (2 pts.) and demonstrated knowledge and understanding of issues of poverty in Canada (3 pts.)	5	
2	Thorough description demonstrating expertise as to how the Contractor would fulfill the following five deliverables: Methodological Plan (15); Work Plan (10); Status Updates (2); Infographics (3); Final Report (5), and fulfill Additional Requirements (5)	40	
3	Clarity of presentation of the proposed approaches.	5	
4	Understanding of the inherent risks, opportunities, and possible concerns in conducting the project, recognition and identification of methodological and logistical challenges, and suggested approaches to deal with them.	5	
	Sub-Total Technical	55	



Management Criteria:			
	45 points, minimum 29.25 points required	points	rating
1	<p>The bidder MUST provide details on the proposed project manager’s role on three projects similar to the requirement described in this Request for Proposal completed in the last five years prior to date of bid close.</p> <p>The following information on previous projects MUST be provided:</p> <ul style="list-style-type: none"> • Title, description, value of project, identity of client, duration and year completed; • Scope of services provided by the project manager; and • Contact information (telephone and e-mail address) for a reference for each of the three projects, who can confirm level of experience and demonstrated success based on the following questions: <ol style="list-style-type: none"> 1. Did the project manager meet deliverables on time? 2. Did the project manager successfully employ qualitative and quantitative research components into their work? 3. Did the project manager demonstrate value for money? 4. Did the project manager complete a final report for the project? If so, did it meet your expectations? 5. Did the project involve consultation and engagement activities with demographic groups vulnerable to poverty (e.g. persons with disabilities, recent immigrants, Indigenous peoples, single parents)? <p>The maximum point total for these criteria is 10. The scoring criteria for this component would include a maximum of 4 points per question, giving a maximum score of 20 for each reference check. The final score (e.g. 45/60) would be converted to a percentage (75%) and then converted to a score out of 10 (7.5).</p> <p>A reference that cannot be reached will result in a score of 0 for that one reference. In its attempt to contact a reference, the Project Authority will attempt three phone calls with three voicemails (if available) over two weeks, and three e-mails over two weeks. Following no response, the Project Authority will assign a score of 0 to that reference check.</p>	10	



2	Clarity and comprehensiveness of the proposed approach to partnering with NGOs and/or academics in each of the six communities. This will be assessed based on, but not limited to, recruitment approach of NGOs/academics, and how the Contractor plans to utilize their expertise (roles and responsibilities) including, but not limited to, participant recruitment, engagement session planning, consultation on proposed methodology, and analysis of results. The proposed approach for partnering with NGOs/academics must also clearly state proposed financial remuneration and plan of payment to NGOs/academics.	10	
3	Project Manager’s qualifications and demonstrated skills with project work using these types of qualitative and quantitative methodologies (5). Project Manager’s experience in overseeing qualitative and quantitative analytical techniques (5).	10	
4	Qualifications of the core project team members in project work of this nature and the chosen methodologies (8 pts.). Level of subject matter expertise with regard to poverty issues in Canada (2 pts.).	10	
5	Clarity and comprehensiveness of the project plan task breakdown by Contractor personnel. This must include, but not be limited to, establishing a clear timeline for the entire project, comprehensive list of each task needed throughout the project, and roles and responsibilities assigned to Contractor personnel.	5	
	Sub-Total Management	45	
	100 points, minimum 65 points required	100	