



Return Bids to :

Retourner Les Soumissions à :

Natural Resources Canada – Ressources naturelles Canada
Bid Receiving Unit – Mailroom
Unité de réception des soumissions, Salle du courrier
588 rue Booth Street
Ottawa, Ontario
K1A 0E4

**Request for Proposal (RFP)
Demande de proposition (DDP)**

The Bidder offers to provide to Canada the goods, services or both listed in the bid solicitation in accordance with the conditions set out in the bid solicitation and at the prices set out in the bid.

Le soumissionnaire offre de fournir au Canada les biens, services ou les deux énumérés dans la demande de soumissions aux conditions prévues dans la demande de soumissions et aux prix indiqués dans la soumission.

Comments – Commentaires

If submitting by courier, please ensure the courier envelope has the RFP number, Closing Date and Closing Time on the front, to avoid confusion in the Bid Receipt Unit.

Issuing Office – Bureau de distribution

Finance and Procurement Management Branch
Natural Resources Canada
580 Booth Street, 5th Floor
Ottawa, Ontario
K1A 0E4

Title – Sujet Survey of Energy Consumption in Multi-Unit Residential Buildings (SEC MURBs)	
Solicitation No. – No de l’invitation NRCan-5000024729C	Date July 17, 2017
Client Reference No. - N° de reference du client 133295	
Requisition Reference No. - N° de la demande 5000024729	
Solicitation Closes – L’invitation prend fin at – à 02:00 PM EST on – le August 25, 2017	
Address Enquiries to: - Adresse toutes questions à: Valerie Holmes	Buyer ID – Id de l’acheteur AB4
Telephone No. – No de telephone (343) 292-8371	Fax No. – No. de Fax (613) 947-5477
If marked “X” please see the box to the left required <input checked="" type="checkbox"/> Acknowledgement copy S’il ya un “X” ici, s.v.p. voir la boîte à la gauche Accusé de réception requis	
Destination – of Goods, Services and Construction: Destination – des biens, services et construction: Natural Resources Canada Energy Sector (ES) 580 Booth Street Ottawa, Ontario K1A 0E4	
Security – Sécurité There is a security requirement Il y a une exigence matière à la sécurité	
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l’entrepreneur Telephone No.: - No. de téléphone: Facsimile No.: - No. de télécopieur: Email: - Courriel :	
Name and Title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/de l’entrepreneur (taper ou écrire en caractères d’imprimerie)	
Signature _____	Date _____



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PART 1 - GENERAL INFORMATION

1. Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

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

The Annexes include:

- Annex "A"** - the Statement of Work
- Annex "B"** – the Basis of Payment,
- Appendix "1"** – List of Energy consumption Surveys
- Appendix "2"** – Geographic Delineation of CMAs
- Appendix "3"** – Links to the Glossaries
- Appendix "4"** – Preliminary Questionnaire
- Annex "C"** – the Security Requirement Checklist

2. Summary

By means of the RFP, NRCan is seeking proposals from Bidders to derive MURBs energy scores for the ENERGY STAR benchmarking tool.

2.1 Security Requirement

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, bidders should refer to the [Industrial Security Program \(ISP\)](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) of Public Works and Government Services Canada (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website

2.2 Applicable Trade Agreements

The requirement is subject to the provisions of the Agreement on Internal Trade (AIT), the North American Free Trade Agreement (NAFTA) and the World Trade Organization – Agreement on Government Procurement (WTO-AGP).



3. Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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

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

The **2003 (2016-04-04)** - Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation with the modifications to the text below. If there is a conflict between the provisions of 2003 and this document, this document prevails.

In the complete text content (except Section 1 – Integrity Provisions – Bid):

DELETE: Public Works and Government Services Canada (PWGSC)

INSERT: Natural Resources Canada (NRCan)

In Section 2 – Procurement Business Number:

DELETE: “Suppliers are required to”

INSERT: “It is suggested that suppliers”

In Section 5.4 – Submission of Bids:

DELETE: sixty (60) days

INSERT: one hundred and twenty (120) days

In Section 8.1 – Transmission by Facsimile:

DELETE: 819-997-9776

INSERT: 613-992-2920

In Section 20.2 – Further Information:

DELETE: in its entirety

2. Submission of Bids

It is the Bidders’ responsibility to ensure that proposals are delivered to the following location, by the time and date indicated on page 1 of this RFP document:

Natural Resources Canada
Bid Receiving Unit - Mailroom
588 Booth Street, Room 108
Ottawa, Ontario K1A 0Y7
Attention: **Valerie Holmes**

It is requested that the Bidder’s name, return address, Request for Proposal Number, and Bid Closing Date appear legibly on the outside of the envelope containing the Bidder’s proposal. Failure to do so may result in bids being misdirected. **NRCan will not assume responsibility for proposals directed to any other location.**



The onus is on the Bidder to ensure that the proposal is delivered to the location above. Not complying with the above instructions may result in NRCan's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

- 2.1 Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to NRCan will not be accepted.

3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **three (3)** business days before the bid closing date. Enquiries received after that time may not be answered.

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

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. Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least **five (5)** business days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

6. Basis for Canada's Ownership of Intellectual Property

Natural Resources Canada has determined that any intellectual property produced under this contract shall be for the following reason:

- (6.5) where the material developed or produced 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

NRCan will accept your bids in one of the following formats:

HARD COPY:

Section I: Technical Bid – 1 copy

Section II: Financial Bid - 1 copy, **under separate cover**. Prices related to the current solicitation must appear in the financial bid only and are not to be indicated in any other section of the bid; prices referenced in the financial bid should not to be repeated in any other section of the bid.

Section III: Certifications – 1 copy

Natural Resources Canada encourages the use of recycled paper and **two-sided printing**. Reduction in the size of documents will contribute to Natural Resources Canada's sustainable development initiatives and reduce waste.

OR:

In support of the Policy on Green Procurement, it is requested that bidders provide their bid as follows:

ELECTRONIC STORAGE MEDIA:

Since NRCan is working towards a greener environment by eliminating all hard copy file folders, we prefer to have all bids on a CD/DVD or USB. If you wish to submit in this format, please provide the following:

Section I: Technical Bid

NOTE: 1 CD/DVD/USB will contain: 1 Technical, sole Financial Bid, Certifications and signed first page (Original)

Section II: Financial Bid - 1 copy (included with original Technical Bid) – saved as a Separate File

Section III: Certifications – 1 copy (included with original Technical Bid and sole Financial Bid) – save as a Separate File

Note: NRCan will accept either Hard copy or Electronic Storage Media submitted bids. However, it is NRCan's preference that you submit using Electronic Storage Media in order to adhere to our green initiative.

NOTE: WHEN SUBMITTING A BID TO THIS SOLICITATION AND YOU USE A COURIER SERVICE, YOU ARE ADVISED TO WRITE THE BID SOLICITATION NUMBER, CLOSING DATE AND TIME ON THE FRONT OF THE COURIER PACKAGE; NOT JUST ON THE ENVELOPES WITHIN THE COURIER PACKAGE IN ORDER TO AVOID ANY UNCERTAINTY FROM OUR BID RECEIPT UNIT WHEN RECEIVING BIDS WITHOUT ANY INDICATION WHAT THEY ARE FOR.

No payment shall be made for costs incurred by the Bidder in the preparation and submission of a proposal in response to this RFP.

To assist Canada in reaching its objectives, bidders are encouraged to:

- i. use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and



- ii. use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.
- iii. use a numbering system that corresponds to the bid solicitation.

1. 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 must demonstrate their capability and describe their approach in a thorough, concise and clear manner for successfully carrying out the work as described in the Annex "A" – Statement of Work.

Bidders must respond to government bid solicitations in an honest, fair and comprehensive manner, accurately reflect their capacity to satisfy the requirements stipulated in the bid or contract documents, and submit bids and enter into contracts only if they will fulfill all obligations of the contract.

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 and may result in a loss of points. 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.

It is the responsibility of the Bidder to obtain clarification of the requirements contained in the RFP, if necessary, prior to submitting a proposal. The Bidder must provide sufficient details in its proposal to substantiate compliance with what is required; all professional experience must be fully documented and substantiated in the proposal(s).

In the event of a proposal submitted through contractual joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture. (All members of the joint venture shall be jointly and severally or solidarily liable for the performance of any resulting contract awarded as a result of a joint venture.)

2. Page 1 of the RFP Document

It is mandatory that all bidders sign their submitted proposal. It is requested that all bidders complete, sign and date Page 1 of this RFP (including the name of the submitting organization, the name of the authorized signing person, appropriate addresses, telephone and facsimile numbers and business contact) when submitting their proposal. As the signature indicates a clear acceptance of the terms and conditions set out in the RFP, it is the Bidder's responsibility to ensure that the signatory has the authority within its organization to commit the Bidder by making such a contractual offer.

As per article 1 of Part 2, the Bidder hereby agrees, by submitting his/her proposal in response to this RFP, to all the instructions, terms, conditions and clauses detailed herein.



3. Section II: Financial Bid

Bidders must submit their financial bid in accordance with Annex "B"- Financial Proposal. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

All bids are evaluated in Canadian currency. Therefore, for evaluation purposes, the noon rate quoted by the Bank of Canada as being in effect on date of bid closing will be applied as the initial conversion factor for the specified currency.

Canada will pay the exchange rate adjustment amount in Canadian currency using the prevailing noon rate on the date of payment by Canada.

3.1 Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

4. Section III: Certifications

Bidders must submit the certifications as per Part 5.



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 evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

1.1 Mandatory Technical Evaluation

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Requirements will be deemed non-responsive and given no further consideration.

Proposals must demonstrate compliance with all of the following Mandatory Requirements and must provide the necessary documentation to support compliance.

Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
M1	<p>Company Information: The Bidder MUST provide vendor information including description of firm, its age, organizational structure and number of locations within Canada as well as a description of its call centers (as applicable) and demonstrate the following:</p> <ul style="list-style-type: none"> • Capacity to conduct the survey in both official languages (English and French) including a list as well as copies of previous surveys that were conducted in both official languages; • A minimum of five (5) years of experience in conducting surveys; • Minimum of three (3) years of experience conducting surveys with at least two surveys completed during that time with at least 1000 respondents which developed estimates for a minimum of four Census Metropolitan Areas (CMAs) within North America in the past ten (10) years from date of bid closing. 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M2	<p>Company References: The Bidder MUST provide reference(s) demonstrating three (3) years of experience within the last ten (10) years from date of bid closing, on survey projects with at least 1000 respondents from multiple CMAs within North America. For each reference the Bidder MUST provide a maximum two (2) page document containing the following information:</p> <ul style="list-style-type: none"> • The reference company's name, mailing address, 	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	<p>contact name and phone number for the referral person;</p> <ul style="list-style-type: none"> The names of the project completed for the referral companies and the starting and completion dates of each project; Project details including the value of the contract, the number of employees of the Bidder assigned to the project, the topic of the survey, geographic distribution of the respondents by CMA, the sample size of the group being surveyed and the values of the quality indicators. <p>NRCan will be contacting the references to confirm referrals and/or to ask for further information.</p>		
M3	<p>Project Employee Information: The Bidder MUST provide a resume of the main resources responsible for the survey (e.g. Project Manager, methodologist and/or programmer) to be assigned to this project</p> <ul style="list-style-type: none"> The Bidder must demonstrate the ability of staff to complete the survey based on education and/or work experience. 	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M4	<p>Security Requirement: Each proposed resource (including sub-contractors) requiring access to PROTECTED information, assets or work sites must each hold a valid RELIABILITY STATUS, granted or approved by the CISD/PWGSC prior to the start of the second year of the contract.</p> <p>AND</p> <p>The Bidder MUST hold the security clearance of the proposed resource(s) prior to the issuance of Phase 2 of this contract.</p> <p>NRCan reserves the right to request proof of valid security clearances prior to issuing Phase 2 of the contract.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M5	<p>Security of Confidential Data: The Bidder MUST provide a description of their plan(s) to back up the respondent data to ensure that data is not lost as a result of transmission or equipment failure.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
M6	<p>Non-Disclosure of Information:</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Item	Mandatory Requirement	Compliant (Yes/No)	Reference to Bidder's Proposal
	The Bidder MUST elaborate on the systems and processes used to guarantee that the confidentiality of the data will be maintained.		
M7	Financial Proposal: The Bidder MUST provide a detailed pricing proposal by activity group indicating additional costs such as translation, printing, mailing (if any is required for the purpose of the survey) and travel.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

1.2 Point Rated Technical Criteria

Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
R1	Vendor Qualifications 1. Company Information: a) Location of firm's headquarters and capacity to support delivery for the surveys in the 8 CMAs b) Years of experience in conducting surveys over five (5) years c) over three (3) years of experience with conducting surveys with at least 1000 respondents from multiple CMAs within North America, within the past ten (10) years from bid closing	Company Information: a) 1 point for the capacity to deliver the survey in each CMA that has been selected for this survey; b) 0.5 points for having been in the survey business starting at six years for a maximum of 5 points for 15 years c) 0.5 points for years of experience in conducting surveys with at least 1000 respondents from multiple CMAs within North America starting at 4 years for a maximum of 3 points for 10 years of experience	25	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
	<p>d) years of experience in conducting surveys related to commercial or industrial or multi-unit residential buildings</p> <p>e) surveys that were conducted in which an element involved collecting energy consumption data from third party energy providers</p> <p>2. Company References: a) details of survey completed including the value of the contract, the number of employees of the Bidder assigned to the project, topics of the survey, geographic distribution of the respondents, the sample / census size of the group being surveyed and values of the quality indicators.</p>	<p>d) 1 point for each relevant survey that the company has conducted as specified in R1C up to a maximum of 4 points</p> <p>e) 1 point will be given for each survey with proof of experience in collecting energy consumption data from third party energy providers to a maximum of 5 points.</p> <p>Company References: The references will be evaluated based on the form in Appendix 5</p>	<p>5</p> <p>27</p>	
R2	<p>Security Requirements</p> <p>1) Descriptions of processes and/or systems to maintain the confidentiality of respondent's data; and</p> <p>2) Description of processes and/or systems to ensure that respondent data is not lost as a result of transmission or equipment failure.</p>	<p>a) 2 points – minimal details in descriptions provided</p> <p>b) 4 points – some details in descriptions provided</p> <p>c) 6 points – reasonable details in descriptions provided</p> <p>d) 8 points – good level details in descriptions provided</p>	<p>20</p>	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
		e) 10 points – complete and extensive details in descriptions provided		
R3	<p>Survey Design:</p> <p>1) Comprehensive description of the methodology to be used to collect building energy consumption data from third party energy providers. Key elements to be included, but not limited to, list of potential energy providers that will need to be contacted for data collection and the mechanism(s) to get the data from third party energy providers;</p> <p>2) Project Schedule – detailed schedule of tasks indicating the ability to meet deadlines for major activities demonstrating the resources available (in-house or outsourced) to complete tasks and identifying which resources will be completing the function (e.g. data collection – call centre; sampling plan – survey manager and methodologist).</p> <p>3) Sampling Frame Creation – will be evaluated for how well the database covers the units required within each of the 8 CMAs to be surveyed; how frequently the data in the database is updated and the date of the most recent update; comprehensiveness of identifying data for units within the database such as contact information (complete address, phone number, contact number, indication of property management firm, if applicable), building characteristics (e.g. building type, size, number of floors);</p>	<p>a) 2 points – Methodology does not cover the majority of the key elements and is impossible to assess the likelihood of delivering high quality results</p> <p>b) 4 points – Methodology is lacking key elements and is unlikely to produce high quality results</p> <p>c) 6 points – Methodology is rigorous for some elements and incomplete in others. It may produce high quality results</p> <p>d) 8 points – Methodology is rigorous but is weak in one aspect. The resulting methodology is likely to produce high quality results</p> <p>e) 10 points – Completed and extensive level of detail provided, and methodology is rigorous, and covers all statistical elements to produce high quality results</p>	70	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
	<p>4) Questionnaire Development – description of how the questionnaire content will be finalized prior to cognitive pre-testing and modified following cognitive pre-testing;</p> <p>5) Cognitive Pre-Testing Plan – will be evaluated for the number of respondents to be tested in each CMA chosen for testing, the breakdown of testing between English and French respondents in each CMA chosen for testing, the number of CMAs where cognitive pre-testing will take place (maximum points will be given if two or more CMAs are part of the testing plan), description of the approach to be taken during the cognitive pre-testing interviews with respondents;</p> <p>6) Sampling Plan – will be evaluated for the targeted error rate or coefficient of variation for the overall survey; the number of units to be sampled based on the collection methodology, the expected number of out of scopes, the expected non-response rate, and the breakdown of the above numbers by CMAs;</p> <p>7) Communication Strategy – the strategy will be evaluated for the types of recipients for communications; timing of the communications relative to the start of collection; intention to produce the communications in both English and French and the approach to be taken to encourage participation in the survey</p>			
R4	Collection Methodology:	a) 2 points – Methodology does not	50	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
	<ol style="list-style-type: none"> 1) Justification for the collection methodology to be used (e.g. telephone interview, personal interview, mail out mail back questionnaire, online web form) and how it is factored into the determination of the sample size. 2) Strategies for dealing with non-response to a questionnaire 3) Strategies to deal with response rates that don't meet minimum levels 4) Description of collection systems being used to capture incoming data for respondents including the possibility that data is being reported from multiple sources for one unit; demonstration that collection systems are adequate to capture data and support data manipulation as well as flag records that will require follow-up) Description of process to collect data from third party energy providers 	<p>cover the majority of the key elements and is impossible to assess the likelihood of delivering high quality results</p> <p>b) 4 points – Methodology is lacking key elements and is unlikely to produce high quality results</p> <p>c) 6 points – Methodology is rigorous for some elements and incomplete in others. It may produce high quality results</p> <p>d) 8 points – Methodology is rigorous but is weak in one aspect. The resulting methodology is likely to produce high quality results</p> <p>e) 10 points – Completed and extensive level of detail provided, and methodology is rigorous, and covers all statistical elements to produce high quality results</p>		
R5	<p>Analysis and Processing:</p> <ol style="list-style-type: none"> 1) Processing – description of steps to be taken during processing to ensure the accuracy of data (e.g. failed edit flags, follow up for non-response to key variables) 2) Analysis Plan – description of how the data will be treated for analysis including checking for the 	<p>a) 4 points – Methodology does not cover the majority of the key elements and is impossible to assess the likelihood of delivering high quality results</p>	48	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
	<p>reasonableness of the data and to check for outliers, imputation for missing data, the method to be used for weighting the records, sample data tables with margins of error to be used to evaluate the overall data quality and reasonableness</p> <p>3) Micro data file and related documentation - description of how microdata file will be created; additional data fields that will be added, data dictionary and data file layout; programs required to re-generate imputation and weighting</p>	<p>b) 6 points – Methodology is lacking key elements and is unlikely to produce high quality results</p> <p>c) 8 points - Methodology is rigorous for some elements and incomplete in others. It may produce high quality results</p> <p>d) 12 points – Methodology is rigorous but is weak in one aspect. The resulting methodology is likely to produce high quality results</p> <p>e) 16 points – Completed and extensive level of detail provided, and methodology is rigorous, and covers all statistical elements to produce high quality results</p>		
R6	<p>Status Reporting to NRCAN:</p> <p>1) Approach for interfacing with NRCAN / RNCAN</p> <p>2) Collection reporting strategy for NRCAN / RNCAN – what will be reported and how often</p>	<p>a) 2 points – minimal reporting details provided</p> <p>b) 3 points – some reporting details provided</p> <p>c) 4 points – reasonable reporting details provided</p> <p>d) 5 points – good level reporting details provided</p> <p>e) 6 points – complete and extensive</p>	12	



Item	Rated Requirements	Points Breakdown	Max Points	Demonstrated Compliance, cross reference to Resume and Page number or proposal and/or resume
		reporting details provided		
R7	Pricing Proposal: In order to be assessed on this factor, the proposal has to have passed all of the technical evaluation criteria listed above. NRCan will allot the highest points to the lowest priced qualifying proposal and will pro-rate all other qualifying proposal by the percentage that their price quote is higher from the lowest priced qualifying proposal	10 points for the lowest priced qualifying proposal. All other qualifying proposals will be pro-rated to the percentage that their price quote is higher than the lowest priced qualifying proposal	66	
Total Points Available:			332	
Total Points Needed to be Considered Compliant (60%):			199	

2. Basis of Selection

Only those bids that are deemed to be responsive (compliant) will be evaluated under the basis of selection:

Highest Combined Rating of Technical Merit and Price

The responsive (compliant) Bidder with the highest combined rating of technical merit (**80%**) and price (**20%**) will be recommended for award of a contract. See the following example table below.

Example of 80% Technical Merit and 20% Price Determination			
	Bidder 1	Bidder 2	Bidder 3
Technical Points Achieved by Bidder	88	82	76
Price Quoted by Bidder	\$85,000	\$80,000	\$75,000
CALCULATIONS			
	Technical Points Achieved	Rated Price Points Achieved	Total Points Achieved
Bidder 1	$\frac{88}{85} \times 80 = 80.00$	$\frac{75}{80} \times 20 = 17.65$	97.65
Bidder 2	$\frac{82}{80} \times 80 = 74.55$	$\frac{75}{80} \times 20 = 18.75$	93.30



Bidder 3	$\frac{76 \times 80}{*88} = 69.09$	$\frac{**75 \times 20}{75} = 20.0$	89.09
* Represents the highest technical score			
** Represents the lowest priced proposal			

Assumption: Three responsive (compliant) bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest bid price receive full rated percentage and other proposals are pro-rated accordingly.

The winner is the Bidder scoring the highest Total Points as a result of applying the Best Value Calculations to the technical bid and the bid price respectively. Based on the above calculations a contract would be awarded to Bidder 1.

Evaluation Criteria for Rating Factor R1

Survey Reference Check Questions

Four points will be awarded for an answer of yes to the four questions listed below. If the answer is not yes, the points will be awarded as follows:

0 –The company chose not to take corrective actions to meet the target

1 – The company made minimal efforts to improve meeting the targets.

2 – The company made efforts to respond to the situation and had some success in improving the target.

3 – While the target was not met we were satisfied that the company made every effort to respond to the situation

- 1) Were the survey deadlines met? If the deadlines were not met, how did the company handle the situation and what do you feel was the cause for deadlines being missed?
- 2) Was the survey budget respected? If the budget was exceeded, by what percentage did the company go over budget? What do you feel was the cause for the budget over runs?
- 3) Was the response rate met? If the response rate was not met, what actions did the company take to improve the response rates?
- 4) Were the targeted data quality values met?

The following questions are to be rated on a scale of 1 to 5 where 1 indicates not satisfied at all and 5 indicates completely satisfied. Points will be awarded based on the scale value given by the referee.

- 5) How satisfied were you with the company’s communication with you on survey topics and issues?
- 6) How satisfied were you with the company’s responsiveness to your concerns regarding the survey?



- 7) How satisfied were you with the company's management of the privacy of the data that they collected on your behalf?



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 made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

1. Certifications Required with the Bid

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

1.1 Declaration of Convicted Offences

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

2. Certifications Precedent to Contract Award and Additional Information

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

2.1 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.

List of Names

Bidders who are incorporated, including those bidding as a joint venture, must provide, prior to contract award, 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.



Certification:

I _____ (Suppliers name) certify that I have read and understand the information contained in the above link to this Certification. I understand that any information I submit in order for the department to confirm my eligibility to receive a contract may be shared and used by NRCan and /or PSPC as part of the validation process, and the results of verification may be publicly disseminated. Moreover, I am aware that any erroneous or missing information could result in the cancellation of my bid as well as a determination of ineligibility/suspension.

Board of Directors:

_____	_____
_____	_____
_____	_____

3. Additional Certifications Precedent to Contract Award

3.1 Status and Availability of Resources

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

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

3.2 Rate or Price Certification

The Bidder certifies that the price proposed is not in excess of the lowest price charged anyone else, including the Bidder's most favoured customer, for the like quality and quantity of the goods, services or both.

3.3 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.

3.4 Former Public Servant

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



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

DEFINITIONS:

For the purposes of this clause, "**former public servant**" means a 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 and includes:

- (a) An individual;
- (b) An individual who has incorporated;
- (c) A partnership made up of former public servants; or
- (d) Sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"**Lump sum payment period**" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the Public Service.

"**Pension**" means, in the context of the fee abatement formula, 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 (FPS) in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES () NO ()**

If so, the Bidder must provide the following information:

- (a) Name of former public servant: _____
- (b) Date of termination of employment or retirement from the Public Service. _____

Work Force Reduction Program

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

If so, the Bidder must provide the following information:

- (a) Name of former public servant;
- (b) Conditions of the lump sum payment incentive: _____
- (c) Date of termination of employment: _____
- (d) Amount of lump sum payment: _____
- (e) Rate of pay on which lump sum payment is based: _____
- (f) Period of lump sum payment including:
 - Start date: _____
 - End date: _____
 - Number of weeks: _____



(g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

Contract Number:

Contract Amount:

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

3.5 Aboriginal Designation

An Aboriginal business, which can be:

- i. a band as defined by the Indian Act
- ii. a sole proprietorship
- iii. a limited company
- iv. a co-operative
- v. a partnership
- vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

This is to confirm:

- Our Company is an Aboriginal Firm, as identified above
- Our Company is NOT an Aboriginal Firm

Signature of Authorized Representative

Date



PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

1. Security Requirements

- a. Prior to award of contract, the following conditions must be met:

For Canadian Suppliers:

1. 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 Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. For additional information on security requirements, Bidders should refer to the [Industrial Security Program \(ISP\) of Public Works and Government Services Canada](http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html) (<http://ssi-iss.tpsgc-pwgsc.gc.ca/index-eng.html>) website.

For Foreign Suppliers:

- i. The Bidders must be from a country within the North Atlantic Treaty Organization (NATO), the European Union (EU) or from a country with which Canada has an international bilateral industrial security instrument. The Contract Security Program (CSP) has international bilateral industrial security instruments with the countries listed on the following PWGSC website: <http://www.tpsgc-pwgsc.gc.ca/esc-src/international-eng.html>.
- ii. The Bidders must provide proof that they are incorporated or authorized to do business in their jurisdiction as indicated in Part 7 - Resulting Contract Clauses.
- iii. The Bidders will need to provide assurance that it can receive and store CANADA PROTECTED information/assets on its site or premises as indicated in Part 7 – Resulting Contract Clauses, Annex A and the listed IT Security Requirements.
- iv.
 - (a) The Bidder's proposed location of work performance and document safeguarding must meet the security requirement as indicated in Part 7 – Resulting Contract Clauses.
 - (b) The Bidders must provide the address(es) of the proposed site(s) or premise(s) of work performance and/or document safeguarding.
- v. Bidders are reminded to obtain the required security clearance promptly as the Work must not be started without the requisite security clearances. Any delay in the award of a contract to allow the successful bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
- vi. In the case of a joint venture Bidder, each member of the joint venture must meet the security and privacy requirements.



- vii. Bidders are reminded that Canada has the right to reject any request to electronically access, process, produce, transmit or store CANADA PROTECTED information related to the Work in any other country if there is any reason to be concerned about the security, privacy, or integrity of the information.
- viii. The Bidders must ensure that all the databases used by organizations to provide the services described in the SOW containing any CANADA PROTECTED information, related to the Work, are located within the North Atlantic Treaty Organization (NATO), the European Union (EU) or from a in a country with which Canada has an international bilateral industrial security instrument. The Contract Security Program (CSP) has international bilateral industrial security instruments with the countries listed on the following PWGSC website: <http://ssi-iss.tpsgc-pwgsc.gc.ca/gvrnmnt/risi-iisr-eng.html> .
- ix. The bid must clearly indicate the work which the Bidder plans to subcontract. All subcontracting arrangements which provide the subcontractor with access to any Canadian restricted sites and/or access to CANADA PROTECTED information/assets are subject to approval by Canada. The description of subcontracting arrangements must demonstrate how the Bidder will ensure that all requirements, terms, conditions, and clauses of the contract are met.

2. Insurance Requirements

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



PART 7 - RESULTING CONTRACT CLAUSES

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

1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid dated _____. (*to be completed at contract award*)

2. Standard Clauses and Conditions

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

2.1 General Conditions

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

As applicable, replace references to Public Works and Government Services Canada (PWGSC) with Natural Resources Canada (NRCan).

2.2 Supplemental General Conditions

2.2.1 Dispute Resolution

Mediation

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMIC). The parties acknowledge receipt of the rules of AMIC. The cost of mediation shall be borne equally by the parties.

Arbitration

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.



Meaning of "Dispute"

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

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

3. Term of Contract

3.1 Period of the Contract

The period of the contracts shall be from contract award to **March 15, 2018** for Phase 1. If NRCan proceeds with Phase 2 (Option Period) of the Project, the Contract will be end **March 15, 2019**.

3.2 Option to Extend the Contract (Phase 2)

The Contractor grants to NRCan the irrevocable option to extend the period of the contract for up to **one (1) additional twelve (12)** month periods, under the same terms and conditions and at the prices and/or rates stated in the contract.

The option may only be exercised by the Contracting Authority, at the request of the Project Authority, and will be evidenced, for administrative purposes only, through a contract amendment. NRCan may exercise the option, or any extension thereof, at any time by written notice to the Contractor at least 30 calendar days prior to the contract expiry date.

4. Security Requirement

For Canadian Suppliers:

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



For Foreign Suppliers:

The Canadian Designated Security Authority (Canadian DSA) for industrial security matters in Canada is the Industrial Security Sector (ISS), Public Works and Government Services Canada (PWGSC), administered by International Industrial Security Directorate (IISD), PWGSC. The Canadian DSA is the authority for confirming Foreign recipient **Contractor / Subcontractor** compliance with the security requirements for foreign suppliers. The following security requirements apply to the Foreign recipient **Contractor / Subcontractor** incorporated or authorized to do business in a jurisdiction other than Canada and delivering outside of Canada the services listed and described in the subsequent **Contract / Subcontract**.

1. The Foreign recipient **Contractor / Subcontractor** must be from a country within the North Atlantic Treaty Organization (NATO), the European Union (EU) or from a country with which Canada has an international bilateral industrial security instrument. The Contract Security Program (CSP) has international bilateral industrial security instruments with the countries listed on the following PSPC website: <http://www.tpsgc-pwgsc.gc.ca/esc-src/international-eng.html>.
2. The Foreign recipient **Contractor / Subcontractor** must provide proof that they are incorporated or authorized to do business in their jurisdiction.
3. The Foreign recipient **Contractor / Subcontractor** defined as an individual or legal entity possessing the legal capacity to enter into a contract, shall provide confirmation of compliance with the below terms and conditions, in writing, to the Canadian Designated Security Authority (DSA), prior to the execution of the works, services or performance, of which requires or involves access to Canadian restricted sites or CANADA PROTECTED information/assets.
4. The Foreign **Contractor / Subcontractor** shall not begin the work, services or performance until the Canadian Designated Security Authority (DSA) is satisfied that all contract security requirement conditions have been met. Canadian DSA confirmation shall be provided, in writing, to the Foreign recipient **Contractor / Subcontractor** in an Attestation Form, to provide confirmation of compliance and authorization for services to be performed.
5. The Foreign recipient **Contractor / Subcontractor** must provide assurance that it can receive and store CANADA PROTECTED information/assets on its site or premises as indicated in Annex A and as listed in the IT Security Requirements.
6. (a) The Foreign recipient **Contractor's / Subcontractor's** proposed location of work performance must meet the security requirement as indicated in Annex A and as listed in the IT Security Requirements.

(b) The Foreign recipient **Contractor / Subcontractor** must provide the address(es) of the proposed site(s) or premise(s) of work performance and/or document safeguarding.
7. The Foreign recipient **Contractor / Subcontractor** must identify an authorized Contract Security Officer (CSO) to be responsible for the overseeing of the security requirements, as defined in this contract. This individual will be appointed by the proponent Foreign recipient Contractor's Chief Executive officer or Designated Key Senior Official, defined as an owner, officer, director, executive, and or partner who occupy a position which would enable them to adversely affect the organization's policies or practices in the performance of the contract.
8. The Foreign recipient **Contractor / Subcontractor** shall not permit access to CANADA PROTECTED A information, except to its personnel subject to the following conditions:
 - a) Personnel have a need-to-know for the performance of the **Contract / Subcontract**;



- b) Personnel have been subject to a criminal record check, with favourable results, from a recognized Governmental agency in **their country** as well as a background verification. The approved verifications for the required criminal record check and background verification are listed at Appendix A;
 - c) The Foreign **Contractor / Subcontractor** will ensure that its Chief Executive Officer (CEO) or Senior Official of the company will appoint a Contract Security Officer (CSO) and/or an Alternate Contract Security Officer (ACSO) in order to ensure compliance with all contracting security requirements;
 - d) The Foreign recipient **Contractor / Subcontractor** shall ensure that personnel provide consent to share results of the Criminal record Background Check with the Canadian DSA and other Canadian Government Officials, if requested;
 - e) The Government of Canada reserves the right to deny access to CANADA PROTECTED information and/ or assets to a Foreign **Contractor / Subcontractor** for cause.
9. All CANADA PROTECTED information/assets provided or generated under this **Contract / Subcontract** will continue to be safeguarded in the event of withdrawal by the recipient party or upon termination of the **Contract / Subcontract**, in accordance with the national policies of the supplier's country.
10. The Foreign recipient **Contractor / Subcontractor** shall provide the CANADA PROTECTED information/ assets a degree of safeguarding no less stringent than that provided by the Government of Canada in accordance with the National Policies, National Security legislation and regulations and as prescribed by the Canadian DSA.
11. All CANADA PROTECTED information/assets provided to the Foreign recipient **Contractor / Subcontractor** pursuant to this **Contract / Subcontract** by the Government of Canada, shall be marked by the Foreign recipient **Contractor / Subcontractor** with the equivalent security classification utilized by the supplier's country and in accordance with the national policies of the supplier's country.
12. The Foreign recipient **Contractor / Subcontractor** shall, at all times during the performance of this **Contract / Subcontract**, ensure the transfer of CANADA PROTECTED information /assets be facilitated through the Canadian DSA.
13. Upon completion of the Work, the Foreign recipient **Contractor / Subcontractor** shall return to the Government of Canada, all CANADA PROTECTED information/assets furnished or produced pursuant to this **Contract / Subcontract**, including all CANADA PROTECTED information/assets released to and / or produced by its subcontractors.
14. CANADA PROTECTED information/assets provided or generated pursuant to this **Contract / Subcontract** shall not be further provided to a third party Foreign recipient Subcontractor unless:
- a. written assurance is obtained from the Canadian DSA to the effect that the third-party Foreign recipient Subcontractor has been approved for access to CANADA PROTECTED information/assets by the Canadian DSA; and
 - b. written consent is obtained from the Canadian DSA, if the third-party Foreign recipient Subcontractor is located in a third country.
15. The Foreign recipient **Contractor / Subcontractor** must ensure that all the databases used by organizations to provide the services described in the SOW containing any CANADA PROTECTED information, related to the Work, are located within the North Atlantic Treaty Organization (NATO), the European Union (EU) or from a in a country with which Canada has an



international bilateral industrial security instrument. The Contract Security Program (CSP) has international bilateral industrial security instruments with the countries listed on the following PWGSC website: <http://ssi-iss.tpsgc-pwgsc.gc.ca/gvrnmnt/risi-iisr-eng.html>.

16. The Foreign recipient **Contractor / Subcontractor** MUST NOT utilize its Information Technology systems to electronically process, produce, or store on a computer system any CANADA PROTECTED information/assets until the Canadian DSA has granted approval to do so. After approval has been granted in writing to the Foreign recipient **Contractor / Subcontractor**, these tasks may be performed up to the level of CANADA PROTECTED A.

See Annex 4A for IT Security Requirements.

17. The Foreign recipient **Contractor / Subcontractor** shall not use the CANADA PROTECTED information/assets for any purpose other than for the performance of the **Contract / Subcontract** without the prior written approval of the Government of Canada. This approval must be obtained from the Canadian Designated Security Authority (DSA).
18. The Foreign recipient **Contractor / Subcontractor** visiting Canadian Government, under this contract, will submit a Request for Site Access to the Departmental Security Officer of the Department of Natural Resources Canada.
19. The Foreign recipient **Contractor / Subcontractor** shall immediately report to the Canadian Designated Security Authority (DSA) all cases in which it is known or there is reason to suspect that CANADA PROTECTED information / assets pursuant to this **Contract / Subcontract** has been compromised.
20. The Foreign recipient **Contractor / Subcontractor** shall immediately report to the Canadian DSA all cases in which it is known or there is reason to suspect that CANADA PROTECTED information/assets accessed by the Foreign recipient **Contractor / Subcontractor**, pursuant this **Contract / Subcontract**, have been lost or disclosed to unauthorized persons.
21. The Foreign recipient **Contractor / Subcontractor** shall not disclose the CANADA PROTECTED information to a third party government, person, firm or representative thereof, without the prior written consent of the Government of Canada. Such consent shall be sought through the Canadian DSA.
22. In the event that a Foreign recipient **Contractor / Subcontractor** is chosen as a supplier for this Contract, subsequent Country-Specific Foreign security requirement clauses shall be generated and promulgated by the Canadian DSA, and provided to the Government of Canada Contracting Authority, to ensure compliance with the security provisions, as defined by the Canadian DSA, in relation to equivalencies.
23. The Foreign recipient **Contractor / Subcontractor** must comply with the provisions of the Security Requirements Check List attached at Annex "C".
24. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the Canadian DSA.
25. Canada has the right to reject any request to electronically access, process, produce, transmit or store CANADA PROTECTED information/assets related to the Work in any other country if there is any reason to be concerned about the security, privacy, or integrity of the information.



ANNEX “4A” – FOREIGN NATIONALS – SECURITY CONDITIONS

The Foreign recipient **Contractor / Subcontractor** shall also insert this Annex “4A” into all contracts/subcontracts into which it enters that involve access to CANADA PROTECTED information / assets.

PHYSICAL SECURITY CONDITIONS

The paragraphs below describe the minimum requirements for the treatment of CANADA PROTECTED information/assets. Further specifications respecting the conditions listed below for physical security may be provided subsequent to a compliance visit if required to identify shortcomings and define the required safeguarding measures to ensure comparability with Canadian standards for the processing, production and storage of CANADA PROTECTED information/assets. It is the responsibility of the Foreign recipient **Contractor / Subcontractor** to identify potential threats to the environment and ensure compliance with identified security requirements.

Document Safeguarding - Physical Security:

The Foreign recipient **Contractor / Subcontractor** shall transfer all CANADA PROTECTED information processed, produced or stored pursuant to this **contract / subcontract** in a single sealed envelope with no security marking only through registered mail of a national postal service or as specified in writing by the Canadian DSA.

The Foreign recipient **Contractor / Subcontractor** shall mark all CANADA PROTECTED information/assets generated pursuant to this **contract / subcontract** as “CANADA PROTECTED” in the upper right corner of the face of the document, and in accordance with the Security Requirement Check list as provided.

In accordance with Article 504 of Chapter 5 of the Canadian Government “Contract Security Manual”, the Foreign recipient **Contractor / Subcontractor** is responsible for ensuring compliance with the following physical safeguarding measures:

- 1. Storage:**
 - a. As a minimum, CANADA PROTECTED information/assets shall be stored in a locked container in an Operations Zone; and
 - b. CANADA PROTECTED information/assets shall not be stored in the same container as negotiable or attractive assets.
- 2. Keys for containers:**
 - a. Keys (devices such as instruments, cards, combinations and code numbers used to open and close containers) shall be safeguarded, commensurate with the highest level of sensitivity of the information to which they provide access. This also applies to recorded information that would allow a key to be produced;
 - b. When a key is issued, the recipient must sign for the key. The number of the key, the location of the container it opens, and the name of the recipient shall be recorded and kept by the Foreign recipient **Contractor’s / Subcontractor’s** Contract Security Officer (CSO);
 - c. The Foreign recipient **Contractor’s / Subcontractor’s** CSO shall maintain a record of the dates of, and reasons for all key or lock changes; and
 - d. Assigned keys should be changed:
 - i. at least every twelve (12) months;
 - ii. when those with access to the container no longer require access; and
 - iii. when a container has been or may have been compromised, the locking mechanism must be changed immediately.



3. Precautions during use:

Special care must be taken to safeguard against unauthorized access when CANADA PROTECTED information/assets are removed from approved storage containers. Specific points to observe are as follows:

- a. do not leave CANADA PROTECTED information/assets unattended;
- b. ensure that CANADA PROTECTED information/assets cannot be viewed; and
- c. ensure that discussion of CANADA PROTECTED information/assets cannot be overheard by persons not holding the appropriate level of clearance, and /or do not have a need-to-know.

Information Technology Systems:

In accordance with security measures required for the treatment and access to CANADA PROTECTED A information, the following describes the minimum security requirements for processing, producing and storing CANADA PROTECTED A information on information systems:

- a. **Access:** Physical access to all hardware elements of the IT system is to be strictly controlled.
- b. **Identification and Authentication (ID&A):** All information systems shall have the following functionality:
 - i. Up-to-date list of authorized users.
 - ii. Positive identification of all users at the start of each processing session.
- c. **Passwords:** Passwords to access the information system are required. Passwords shall be a minimum of 6 characters long (9 is preferable) and shall include numeric and “special” characters (if permitted by the information system) as well as alphabetic characters.
- d. **Internal Access Control:** All information systems shall have internal access controls to prevent unauthorized users from accessing or modifying the data.
- e. **Data Transmission:** CANADA PROTECTED A information must be transmitted or accessed electronically (e.g. point to point computer links) via a public network like the internet, only with the use of approved commercial encryption devices validated by the Canadian DSA.
- f. **Security Accounting and Audit:** Security relevant events fall into two categories, namely “legitimate events” and “violations”.
 - i. The following types of events shall always be recorded:
 - a. All log on attempts whether successful or failed;
 - b. All log off (including time out where applicable);
 - c. The creation, deletion or alteration of access rights and privileges; and
 - d. The creation, deletion or alteration of passwords.
 - ii. For each of the events listed above, the following information is to be recorded:
 - a. Type of event;
 - b. User ID;
 - c. Date and Time; and
 - d. Device ID.

The accounting records shall be stored in a facility to provide the information System Manager with a hard copy of all or selected activity. There shall also be a facility for the records to be printed in an easily readable form. All security records are to be inaccessible to users without a need-to-know.



If the operating system is unable to provide this, then the equipment shall be protected by physical means when not in use (i.e. locked away or the hard drive removed and locked away).

g. Integrity and Availability: The following supporting measures shall be implemented:

- i. Provide general protection against normally foreseeable accidents, mishaps and known recurrent problems (e.g. viruses and power supply variations);
 - ii. Defined Business Contingency Plan;
 - iii. Data backup with local storage; and
 - iv. Anti Virus Software (implementation, with updates, of an acceptable industry standard Anti-virus software).
- h. Logon Banners:** Wherever possible, a “Logon Banner” shall be provided to summarize the requirements for the information system, which may be utilized to institute legal action in case of any breach occurring. A suggested format for the text is below:
“Unauthorized access to this computer system may constitute a criminal offense”.
- i. **Unattended Terminals:** Authorized users are to be automatically logged off the system if their terminals have been inactive for a predetermined period of time, or their terminals must activate a password protected screen saver after 15 minutes of inactivity, to prevent an attacker making use of an unattended terminal.
 - j. **Internet Connections:** Computer systems shall not be connected directly to the Internet unless protected by a firewall (a software personal firewall is the minimum).
 - k. **Disposal:** Before IT storage media (e.g. disks) are disposed of, an erasure product shall be used to overwrite the data. This is a more thorough process than deletion of files.



ANNEX “4B” – FOREIGN NATIONALS - PERSONNEL

The Foreign recipient **Contractor / Subcontractor** must perform a security screening of all its personnel who will need access to CANADA PROTECTED A information/assets:

- a) Identity check:
 - i. Copies of two of valid original pieces of government issued identity documentation, one of which must include a photo
 - ii. Surname (last name)
 - iii. Full given names (first name) – underline or circle usual name used
 - iv. Family name at birth
 - v. All other names used (aliases)
 - vi. Name changes
 - 1. Must include the name they changed from and the name they changed to, the place of change and the institution changed through
 - vii. Sex
 - viii. Date of birth
 - ix. Place of birth (city, province/state/region, and country)
 - x. Citizenship(s)
 - xi. Marital status/common-law partnership
 - 1. Current status (married, common-law, separated, widowed, divorced, single)
 - 2. All current spouses (if applicable)
 - a. Surname (last name)
 - b. Full given names (first name) – underline or circle usual name used
 - c. Date and duration of marriage/common-law partnership
 - d. Date of birth
 - e. Family name at birth
 - f. Place of birth (city, province/state/region, and country)
 - g. Citizenship(s)
- b) Residency check:
 - i. The last five (5) years of residency history starting from most recent with no gaps in time.
 - 1. Apartment number, street number, street name, city, province or state, postal code or zip code, country, from-to dates.
- c) Educational check:
 - i. The educational establishments attended and the corresponding dates.
- d) Employment history check:
 - i. The last five (5) years of employment history starting from most recent with no gaps in time.
 - ii. Three (3) employment reference check from the last five (5) years.
- e) Criminal records check:
 - i. Report(s) containing all criminal convictions for the last five (5) years in and outside of the candidate’s country of residence.



- f) Credit check:
 - i. Credit check report where available.

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Valerie Holmes**
Title: Procurement Specialist
Organization: Natural Resources Canada
Address: 580 Booth Street, 5th Floor, Room 5-D4-2
Ottawa, Ontario, K1A 0E4
Telephone: (343) 292-8371
Facsimile: (613) 947-5477
E-mail address: Valerie.holmes@canada.ca

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

5.2 Project Authority (to be provided at contract award)

The Project Authority for the Contract is:

Name:
Title:
Organization:
Address:
Telephone:
Facsimile:
E-mail address:

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

5.3 Contractor's Representative

Name:
Title:
Email:

6. Proactive Disclosure of Contracts with Former Public Servants

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be reported on departmental



websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2012-2](#) of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Basis of Payment - Limitation of Expenditure

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

7.2 Method of Payment

Monthly Payment

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

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

8. Invoicing Instructions

Invoices shall be submitted using **one of the following methods:**

<u>E-mail:</u>	OR	<u>Fax:</u>
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<p>NRCan.invoice_imaging-service_dimagerie_des_factures.RNCan@canada.ca</p> <p>Note: Attach "PDF" file. No other formats will be accepted</p>	<p>Local NCR region: 613-947-0987 Toll-free: 1-877-947-0987</p> <p>Note: Use highest quality settings available.</p>
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Please do not submit invoices using more than one method as this will not expedite payment.

Invoices and all documents relating to a contract must be submitted on the Contractor's own form and shall bear the following reference numbers: Contract number: _____

Invoicing Instructions to suppliers: <http://www.nrcan.gc.ca/procurement/3485>

9. Certifications

9.1 Compliance

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

10. Applicable Laws

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

11. 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 (2016-04-04) – Higher Complexity – Services;**
- c) the supplemental general conditions (contained herein);
- d) Annex "A", Statement of Work and its appendices;
- e) Annex "B", Basis of Payment;
- f) Annex "C", Security Requirement Checklist;
- g) the Contractor's bid dated _____.

12. Foreign Nationals (Canadian Contractor OR Foreign Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) - Foreign Nationals (Canadian Contractor)

SACC Manual clause [A2001C](#) (2006-06-16) - Foreign Nationals (Foreign Contractor)



13. Insurance

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

14. Contract Administration

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



ANNEX “A” – STATEMENT OF WORK

SW1 Title

Survey of Energy Consumption in Multi-Unit Residential Buildings (SEC MURBs)

SW2 Background

Natural Resources Canada (NRCan) works to ensure the responsible development of Canada's natural resources, including energy, forests, minerals and metals. The Energy Efficiency Act (EEA) establishes that NRCan has the authority to collect data and statistics for the purpose of promoting energy efficiency.

The Industry and Buildings Division of NRCan’s Office of Energy Efficiency (OEE) aims to help the building sector reduce its energy consumption through a suite of programs and services. These include enhancing the National Energy Code of Canada for Buildings 2011, the delivery of the Canadian adaptation of the US Environmental Protection Agency Portfolio Manager energy benchmarking tool, developing case studies, and information to building owners. The Division is also responsible for the delivery of the Federal Buildings Initiative. The Division is always analyzing the market to align its programming to the stakeholder’s needs.

The OEE in partnership with Statistics Canada has conducted several surveys on energy consumption patterns within Canada for various building types but has primarily focused on commercial and institutional buildings. The most recent surveys include the second iteration of the Survey of Commercial and Institutional Energy Use (SCIEU) (2014 reference year) and the first iteration of the Survey of Energy Consumption in Arenas (SECA). A complete list of the surveys that has been conducted with Statistics Canada can be found in Appendix 1. The surveys do not currently cover all of the potential building types possible within Canada.

The Industry and Buildings Division of OEE has identified a data gap in the area of multiple-unit/multiple-use residential buildings. Information is required to quantify the stock, understand the energy use and calculate greenhouse gas (GHG) emissions for this building type. In order to do this it is necessary to have a survey of MURBs that provides statistically-reliable characteristics on buildings in this sector and quantify their energy use in relation to other types of buildings. The survey will collect factual data on building characteristics and energy consumption in order to achieve these goals.

PLEASE NOTE: THIS IS NOT A PUBLIC OPINION RESEARCH SURVEY.

The primary purpose of the survey results is to derive MURBs energy scores for the ENERGY STAR Benchmarking tool. Results would also assist NRCan in future program planning and establish a baseline for comparison with future years.

For a MURB to be in scope for this survey it must meet the following criteria:

- 1) be greater than 3 storeys in building height (ie. 4 storeys or more) **or** be greater than 600 m² in footprint;
- 2) have a common entrance; and
- 3) properties can be for mixed uses but the primary use must be for residential purposes (i.e over50% of the floor space must be for residential purposes (e.g. apartments, condominiums or cooperatives).



NOTE:

Basements (full or semi) will count as a storey if 75% of the total basement floor area is livable space (dwelling units). Total floor area includes spaces such as garage, storage and laundry whether these spaces are conditioned or not.

A garage is not considered to be a sole common entrance.

EXCLUSIONS: Hotels, long term/senior care facilities and vacation resorts are not in scope for this survey.

A MURBs survey has the following requirements:

- NRCan does not have a pre-existing sampling frame from which to draw the sample. The contractor must be prepared to develop a frame for the purposes of this survey or to use a pre-existing frame that they own or have purchased. The creation of the frame will be one of the evaluation criteria for submitted proposals;
- the survey will be conducted as a voluntary survey;
- energy consumption data needs to be collected from multiple sources (including but not limited to tenants, property managers, utilities, building owners and/or tenants) for each MURB. The methodology to collect energy data from multiple sources (especially utilities) will be one of the evaluation criteria for submitted proposals;
- the collection system must be designed to allow sections of the questionnaire to be answered by different respondents with a tracking system that indicates which sections of data are incomplete;
- Awarding of contract – This RFP is being released as a two phase contract. Contractors will be asked to divide their bid into two separate fiscal years (2017/18 and 2018/19) with the option for NRCan to not offer the second contract. Year 1 of the contract will be awarded for fiscal year 2017/2018 and will involve the creation of the frame, the sampling approach, and the questionnaire content (including translation).
- Year 2 (fiscal year 2018/2019) of the contract will involve the data collection, processing, analyzing as well as the production of output tables and the microdata file.
- Section 4.1 has a summary breakdown of the activities to be performed in each year of the project.

Additional constraints

Security clearance – all of the personnel of the successful contractor who will be working on this project, as well as the personnel of any sub-contractors must be security cleared at the Reliability level of government security

Non-disclosure of information – This refers to any and all information which is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in order to fulfil the requirements of the Contract. This includes data held in any type of electronic format and information provided directly, indirectly or through third parties to the contractor or sub-contractors employed by the contractor.

SW3 Objectives

Develop and conduct a sample survey on MURBs characteristics and energy consumption within Canada from the following eight CMAs. A precise definition of the geographic delineation of CMAs can be found in Appendix 2:

Halifax
Montreal
Ottawa/Gatineau



Toronto
Hamilton
Winnipeg
Calgary
Vancouver

- Phase 1 of the survey will involve the creation of the frame, the sampling approach, and the questionnaire content (including translation).
- Phase 2 will involve data collection, processing (including editing, imputation and weighting), analyzing as well as the production of output tables and the microdata file.
- Data needs to be of sufficient quality (as outlined in Section 4.4) to serve as source data for the regression analysis required for score determination in the ENERGY STAR Portfolio Manager tool.
- Produce a microdata file which contains all captured data from collection, edited data, imputed data and record weights.

NRCan must receive the programming for imputation and weighting in SAS code.

SW4 Project Requirements

SW4.1 Tasks, Deliverables, Milestones and Schedule

The following tasks shall be performed by the Contractor:

- The contractor must indicate the methodology that they plan to use for data collection. If a pre-contact is not being conducted the proposed methodology must indicate how the sample size is being adjusted to accommodate for the lack of a pre-contact. The collection methodology plan is an element of the evaluation criteria.
- The reference year for the survey will be for the energy consumption year 2016 (January 1 to December 31, 2016).
- For contractors who choose to conduct a pre-contact the following conditions apply:
 - 1) Contractor must attempt four calls to reach the respondent.
 - 2) These calls must be done at varying times on various days.
 - 3) The contractor must record the time and date of each attempted call.
 - 4) Respondents who refuse to answer the pre-contact must be identified as a refusal.
- Respondents must be offered the opportunity to complete the pre-contact (if conducted) and/or the questionnaire as well as any calls that they may make to the contractor in the official language of their choice (English or French). Respondents must be made aware that they can participate in the official language of their choice.
- Unless NRCan specifies otherwise the hours at which the contractor can initiate a call to respondents are restricted to weekdays (Monday through Friday) between 9:30 a.m. and 7:00 p.m. The hours specified refer to the time zone in which the respondent will be receiving the phone call. If a respondent indicates that they wish to be contacted outside of these hours the contractor may do so.

- The survey must provide statistically significant estimates (a standard error of 8% or better) for the following critical data points by CMA: Number of buildings; amount of floor space; number of buildings reported for; and for all energy data.

Those contractors completing a pre-contact are asked to submit a sample reporting table including statistics such as number contacted per CMA, out of scopes, no contact and refusals. All contractors will be asked to submit a sample layout for collection status reports. The information contained in these tables will be used as part of the evaluation criteria for the sampling plan.

The following table lists the major activities and their associated deadlines. Contractors will be required to provide a detailed project schedule including interim deadlines that will meet the major deadlines in the table listed below. Please note that the detailed project schedule and a description of how the major tasks will be performed are elements of the evaluation criteria.

Fiscal Year	Phase	Task	End Date
2017/2018	1 Planning and Design		
		Frame Development	
		Questionnaire Development	
		Plan to Collect Data from Utilities	
	2 Collection and Processing Development	Collection Plans/Design	March 16, 2018
		Creation of Sample	
		Release of Survey	
2018/2019	3 Collection	Collection Closes	
	4 Data Processing, Validation and Dissemination	Imputation and Weighting	
		Production of Microdata File and Related Documentation	February, 2019
		Production of Output Tables	February, 2019

Please note: The deadlines established in the chart above are mandatory (unless otherwise negotiated during the contracting process).

SW4.2 Reporting Requirements

Please note: all communications with potential or actual respondents must be conducted in the respondent’s choice of official language (English or French). All documents intended for respondents (including screen captures for collection and follow up systems) must be in both official languages. The successful contractor will be expected to provide NRCan these documents in both official languages. NRCan will submit these documents to their translation group to ensure that the “translations are correct” as part of their final approval process. The



process of translation verification will require “one week”. Contractors must build this timing into their project schedule.

The following documents will need to be submitted in both official languages as their content will be used in communications with respondents:

- Pre-contact specifications (if contractor is conducting a pre-contact)
- Draft copies of questionnaire content
- Approved of final questionnaire content (including glossaries and instruction manuals for respondents)

Please note: the following items do not involve contact with respondents and, therefore, do not need to be produced in both official languages:

- Project meetings between Client and Contractor to be held bi-weekly (Minutes of the Meeting are to be taken)
- Pre-contact report (for those Bidders who choose to conduct a pre-contact)
- Cognitive testing plan
- Report on cognitive testing of the questionnaire including proposed versions to the questionnaire
- The communications strategy discussing how the contractor and/or NRCan are expected to communicate with various parties (e.g. respondents, condo associations, utilities) in an effort to increase the response rate
- Collection edits – such as fields for follow up; error checks/verifications
- Weekly collection reports which indicate (at a minimum) the following information by CMA: the number of questionnaires completed in that week, the overall target number for that CMA and the cumulative percentage of the target that has been completed by CMA
- Bi-weekly reports on the status of the processing and analysis activities
- Draft and final methodology reports including response rate, imputation rates, discussion of weighting system and recommendations for future surveys
- Preliminary and Final microdata file(Excel SAS data format) including all data collected from respondents, edited and/or imputed data, record weights as well as the file layout, data dictionary and the programs used for imputation and weighting.

SW4.3 Method and Source of Acceptance

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.

SW4.4 Specifications and Standards

The sample design must be developed to target an 8% or better standard error on estimated proportions for the key domains of interest. The sample design will be part of the evaluation criteria for the proposals received.



SW4.5 Technical, Operational and Organizational Environment

The MURBs survey design must be similar to the other surveys in the SCIEU platform in order to ensure compatibility of the data for the ENERGY STAR benchmarking program. Building owners and managers will use this program to assess how their building is performing in terms of energy consumption versus similar types of buildings. For this reason the data definitions must be consistent with those used in the SCIEU 2014 and the Fannie Mae surveys. The links to the glossaries from these surveys are found in Appendix 3.

While the bulk of the work will be done on the contractor's site, it will be approved by a working committee comprising members from the contractor and from Natural Resources Canada.

The working committee will be expected to meet bi-weekly and on other occasions when it is deemed necessary.

SW5 Other Terms and Conditions of the SOW

SW5.1 Contractor's Obligations

In addition to the obligations outlined in Section 2 of this Statement of Work, the Contractor shall:

1. keep all documents and proprietary information confidential;
2. maintain all documentation in a secure area
3. guarantee confidentiality of all respondent materials including their address and contact information as well as responses to survey questions as per Government of Canada policy on Privacy Act. Protection of Personal Information. Section 7; attend meetings with stakeholders, some of the meetings may potentially be held at NRCan facilities;
4. participate in teleconferences, as needed;
5. produce all documents in both official languages where specified in Section 4.2;
6. communicate with respondents in the official language of the respondent's choice;
7. all written reports must be in electronic Microsoft Office Word format;
8. provide NRCan with an electronic version of the survey microdata file (preliminary and final versions) including the original responses to the survey as well as any edited or imputed values (indicating which values were edited and/or imputed) and weights for the record;
9. NRCan must be provided with the software required to produce the weights and the estimates;
10. table of estimates by stratification factors; and
11. at the completion of the project the Contractor must submit all materials created in the progress of this survey to NRCan and cannot retain any materials. The Contractor does not have the right to do any analyses for their own purposes and does not have the right to release any analyses from this survey at any point in time;

SW5.2 NRCan's Obligations

- access to departmental library, government and departmental policies and procedures, publications, reports, studies, etc.
- provide contractor with access to a staff member who will be available to coordinate activities
- all documents for circulation will receive final verification from NRCan translators prior to the documents being printed for distribution. Please allow 5 days per document for NRCan translation verification
- provide comments on draft reports within five (5 working days) and/or,
- provide via this RFP (please see Appendix 4) a preliminary version of the questionnaire in both English



- and French (NOTE: questionnaire may be subject to minor changes, especially following cognitive testing)
- provide other assistance or support.

SW5.3 Estimated Period of the Contract

The estimated period of the contract is from the date of Contract Award to **March 15, 2018** for Phase 1 of the contract. If NRCan proceeds with Phase 2 of the project the contract will be awarded as soon as the funds are confirmed for fiscal year 2017/2018 and will end on **March 15, 2019**.

SW5.4 Location of Work, Work Site and Delivery Point

The successful contractor will be expected to complete all of this work on their own secure premises and network systems. Some travel may be required (for example, in order to conduct cognitive testing or for the purposes of training collection or support staff workers). The contractor is expected to include the travel costs as an element of their costing breakdown. Travel costs are eligible expenses in the contract which must be pre-approved by NRCan (approval process takes approximately three months) and will be reimbursed according to [Treasury Board Travel Guidelines](#).

SW5.5 Language of Work

Section SW4.2 indicates which documents must be created in both official languages. The successful contractor must communicate with potential and actual respondents in the respondent's choice of official language.

SW5.6 Special Requirements

The purpose of this project is to collect data regarding energy consumption in MURBs within the eight CMAs listed in SW3. This will involve contact with MURB owners, property managers, tenants and/or utility providers.

SW6 Required Resources or Types of Roles to be Performed

Contractor Information:

The proposal should include a description of the contractor's firm, its age, organization, number of locations within Canada as well as a description of its call centers (should it have call centers).

NOTE: The contractor's information is a mandatory element of the proposal submission.

The Contractor should also include references from three (3) years of experience within the last ten (10) years on survey projects with at least 1000 respondents from multiple CMAs within North America involving energy consumption for either commercial or institutional or MURBS buildings. NRCan may choose to approach the contact person for information relating to the quality of the work provided by the Contractor.

The references for Contractors will be assessed as indicated in the evaluation criteria.

For each category of staff listed below the resumes for each staff member must identify their language abilities, educational background/experience as well as any subject matter expertise of the professionals working on the survey. In addition the proposal should identify the number of hours that each professional will be dedicating to the project.



Survey manager
Methodologists
Programmers

In order to successfully complete the project according to the suggested deadlines, the successful Contractor may choose to employ more than one person for a particular role within the project. In the cases where multiple staff will be needed (i.e. data collection and phone support) it is not necessary to provide resumes for all staff. A breakdown of approximate numbers by English and French abilities as well as a description of the typical backgrounds/experiences will be sufficient.

Please note: the proposal must clearly indicate if the contractor intends to use sub-contractors. It will be the Contractor's responsibility to ensure that sub-contractors and outsourced work meet the criteria for this survey.

SW7 Applicable Documents and Glossary

SW7.1 Applicable Documents

Appendix 1 contains a list of surveys conducted by Statistics Canada and by Fannie Mae([2012 Multifamily Market Research Energy and Water Survey](#)) on energy consumption.

Appendix 4 contains a copy of the preliminary questionnaire for this survey

SW7.2 Relevant Terms, Acronyms and Glossaries

Appendix 3 contains a link to the glossary used for SCIEU 2014 and a link to the glossary for the 2012 Multifamily Market Research Energy and Water Survey.



APPENDIX “1” – LIST OF ENERGY CONSUMPTION SURVEYS

Survey of Energy Consumption of Arenas

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=5222>

Survey of Commercial and Institutional Energy Use (2014)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=5034&lang=en&db=imdb&adm=8&dis=2#a3>

Survey of Commercial and Institutional Energy Use (2009)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=81719>

Commercial and Institutional Consumption of Energy Use (2008)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=55380>

Commercial and Institutional Consumption of Energy Use (2007)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=52470>

Commercial and Institutional Consumption of Energy Use (2005)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=29384>

Commercial and Institutional Consumption of Energy Use (2004)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=23767>

Consumption of Energy Survey (2003)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=7491>

Consumption of Energy Survey (2002: Pilot Survey)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=5883>

Commercial and Institutional Building Energy Use (2000)

<http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=2943&lang=en&db=imdb&adm=8&dis=2>



APPENDIX “2” – GEOGRAPHIC DELINEATION OF CMAS

In order to determine the geographic limits of these CMAs please go to this link:

http://www5.statcan.gc.ca/access_acces/alternative_alternatif.action?l=eng&k=6100&teng=Standard%20Geographical%20Classification,%20National%20maps,%20Census%20metropolitan%20areas%20and%20census%20agglomerations,%202011&loc=http://www12.statcan.gc.ca/census-recensement/2011/geo/map-carte/pdf/2011-12572-01-B.pdf

When you click on the pdf link a map of Canada will open. The CMAs are listed on the upper right hand corner of the map. By selecting each of the eight CMAs above from the list you will see a map indicating the CMA's geographic limits.



APPENDIX “3” – LINKS TO THE GLOSSARIES FOR SURVEY OF COMMERCIAL AND INSTITUTIONAL ENERGY USE, 2014 AND FOR 2012 MULTIFAMILY MARKET RESEARCH ENERGY AND WATER SURVEY (FANNIE MAE)

Survey of Commercial and Institutional Energy Use, 2014

http://www23.statcan.gc.ca/imdb-bmdi/document/5034_D10_T9_V1-eng.htm

Fannie Mae 2012 Multifamily Market Research Energy and Water Survey

<https://www.fanniemae.com/multifamily/green-initiative-market-research-survey>



APPENDIX “4” – PRELIMINARY QUESTIONNAIRE

Survey of Energy Consumption Multi-Unit Residential Buildings (SEC MURBs) 2016

Which building should you report for?

When completing this questionnaire, please report for the building identified by the label on the cover page. Please report for the total space of the building, including space occupied by other organizations, including residential and commercial space.

The survey data will be used to measure energy consumption and calculate energy intensity by building type occupied by different industries in Canada’s multi-unit residential building (MURBs) sector. To determine energy intensity, we need both the total energy consumption and the total floor space of this building associated with the energy consumption.

You are a MURB:

1. If your building is greater than 3 storeys in building height (i.e. 4 storeys or more) **or** be greater than 600 m² in footprint; and
2. It has a sole common entrance

Notes:

1. **Basements** (full or semi) will count as a storey if 75% of the total basement floor area is livable space (dwelling units). Total floor area includes spaces such as garage, storage and laundry whether these spaces are conditioned or not; and
2. **Sole common entrance** cannot be a garage

A – Operations

1. During the 2016 calendar year, which months was this building in operation?

- All 12 months; **OR**
 only the following months:

The purpose of this survey:

Contractor’s name is conducting this survey on behalf of Natural Resources Canada (NRCan), to collect detailed information on the energy demand and consumption patterns of Canadian MURBs. This survey collects data on the types and quantities of energy (such as electricity, natural gas, etc.) consumed by MURBs in Canada. One of the principal goals of Natural Resources Canada is to continually improve energy efficiency in Canada through



various measures. Improving energy efficiency reduces greenhouse gas emissions that contribute to climate change.

This worksheet is designed to help you gather the required information prior to our personal interview that will take place. Gathering this information prior to your personal interview is crucial to the success of this initiative. You will be contacted shortly to set up an interview time that works for you.

Who should complete this questionnaire?

This questionnaire should be completed by a manager or facilities manager with a thorough knowledge of your MURBs energy use.

Where to find energy-consumption information?

Common sources for finding your MURB's energy consumption include your utility bills, your energy management information system, your utility company, as well as your landlord or property manager.

Reporting

Please report on all energy consumed during the 2016 calendar year.

Preferred Language

Two (2) French

One (1) English

If necessary, please make address label corrections below.

Confidential when completed

Business Name (if applicable): _____

Legal Name (if applicable): _____

Address (number and street): _____

City: _____

Province/Territory/State: _____

Postal Code: _____

Country: _____

Last Name of Contact: _____

First Name of Contact: _____

Title of Contact: _____

Email Address: _____



MURB Characteristics

1. During the 2016 calendar year, which months was the building occupied?

All 12 months; **OR**

Mark all that apply:

- January February March April May June
 July August September October November December

2. As of December 31, 2015, what was the total floor area of the building?

- Include all enclosed floors of the building, such as residential units, commercial tenants, indoor parking (include partially exposed parking), mechanical areas, common areas and basements
- If you don't know the exact space, please provide your best estimate (i.e. multiply the length of your building by its width and by the number of floors)

Total floor area of the building measured in:

- Square feet (ft²)
 Square metres (m²)

3. As of December 31, 2016, how was the total floor area of this building allocated?

- Include all enclosed floors of the building, including mechanical areas and basements
- Include annexes and temporary areas

Allocation of the building floor area	Percentage of the building floor area
Total floor area of this building 100	100%
Floor area occupied by your residential tenants including the associated common areas	%
Floor area occupied by other commercial tenants including associated common areas	%
Vacant (unoccupied rentable space)	%
Indoor parking (include partially exposed parking)	%



4. As of December 31, 2016 and for all of the buildings on the property, provide the number of units of each of the following configurations. The number of units should include the super’s or manager’s apartment, model units, vacant, occupied and down units.

	Unit Type	Total Number of Units
1.	Total number of studio/efficiency/junior bedroom units	
2.	Total number of 1 bedroom units	
3.	Total number of 2 bedroom units	
4.	Total number of 3 bedroom units	
5.	Total number of 4 or more bedroom units	

5. Please indicate the percentage of total floor area of this building (as reported in 2 above) that was, for the 2016 calendar year.

a) heated to at least 10 degrees Celsius (50 degrees Fahrenheit)

- Include basements
- Exclude indoor parking areas

%:

b) Air conditioned

- Include basements
- Exclude indoor parking areas

%:

6 a) Does this building have heated indoor parking?

- Yes
- No – Go to 6 c)

6 b) Is the energy consumed within the indoor parking (lighting and heating) included on the utility bill or in the lease payment for this building?

- Yes
- No
- N/A (no energy consumed within the indoor parking)

6 c) Does this building have outdoor parking?

- Yes
- No – Go to 7



6 d) Is the energy consumed within the outdoor parking area (lighting, plug-ins) included on the utility bill or in the lease payment for this building?

- Yes
- No
- N/A (no energy consumed within the outdoor parking)

7. Select the primary property type present at your property (fill in one option only)

- Rental
- Cooperative
- Condominium

Not one of the above – Please explain: _____

More than one of the above – Please explain: _____

8. Select which type of residential population the property is primarily marketed to and/or dedicated to. (Fill in the one option that applies to more than 50% of the residents)

- No majority population/general purpose housing
- Military
- Student
- Senior/Independent Living
- Special Accessibility Needs
- Other dedicated housing that represents the majority of the population

Please explain: _____

9. Does this property have a green building certification? Fill in all that apply

- None
- EarthCraft, Greater Atlantic Home Builders Association and South Face
- Enterprise Green Communities Criteria, Enterprise Community Partners
- Green Globes, Green Building Initiative
- Greenpoint, Build it Green
- Home Energy Rating System, RESNET
- LEED, US Green Building Council
- National Green Building Program, National Association of Home Builders
- ENERGY STAR, Natural Resources Canada
- Other Green Building Certification. Please specify: _____



BUILDING ACTIVITY

10 a) In which year was this building constructed?

- If two or more portions were constructed at different times, then choose the oldest

Year: _____

10 b) Have there been major additions to this building since this building was originally constructed?

- Yes
- No – go to Question 11

10 c) Please provide the year the largest addition was built and the percentage of total building area this additional represents.

Year of addition	% of total building area reported in question 5a
	%

11. How many floors are in the tallest section of the building?

- Include basements, parking levels, or any other floors below ground level
- Exclude half floors, mezzanines, balconies and lofts

Floors: _____

12. How many elevators are in this building?

- Include service elevators and lifts

Elevators: _____

13. How many walls of this building at the ground level or higher are shared with another building?

- None (the building is free standing)
- One
- Two
- Three
- Four or more

14. Is this building part of a multi-building complex?

- Yes
- No

If yes, how many buildings: _____



BUILDING AMENITIES

15. As of December 31, 2016, how many of the following amenities were available in this building?

- Please insert “0” if the amenity is not available in this space. Responses should include both inoperable and operable machines. Laundry hook ups should include both pay-per-use and free washer, dryer or combination units with unique plug. A half bathroom counts as one (1) bathroom.

	Amenity	Total number
a	Dishwasher hook ups	
b	Laundry hook ups	
c	Elevators, including penthouse and freight elevators	
d	Bathrooms (include both half and full in all residential units)	
e	Common area bathrooms	
f	Computers in common area staff spaces and retail/commercial space (including leasing and business center)	

- If you don’t know the exact number, please provide your best estimate

16. How many pools does this MURB have?

- Do not include whirlpools, Jacuzzi tubs or hot tubs. Enter “0” if there are not pools on the property.
- If “0” go to question 17

Pool type. (Select one pool per row).	Location	Is the pool heated?	Energy consumption and cost included in the data provided?	Water consumption and cost included in data?	Months in use in 2016
<input type="checkbox"/> Recreational (20 yards x 15 yards) <input type="checkbox"/> Short course (25 yards x 20 yards) <input type="checkbox"/> Olympic (50 meters x 25 meters) <input type="checkbox"/> Other, please specify: _____	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Recreational (20 yards x 15 yards) <input type="checkbox"/> Short course (25 yards x 20 yards) <input type="checkbox"/> Olympic (50 meters x 25 meters) <input type="checkbox"/> Other, please specify: _____	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	



Pool type. (Select one pool per row).	Location	Is the pool heated?	Energy consumption and cost included in the data provided?	Water consumption and cost included in data?	Months in use in 2016
<input type="checkbox"/> Recreational (20 yards x 15 yards) <input type="checkbox"/> Short course (25 yards x 20 yards) <input type="checkbox"/> Olympic (50 meters x 25 meters) <input type="checkbox"/> Other, please specify: _____	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	

17. What is the total floor area (length by width) of the gymnasium(s)?

- If more than one (1) gymnasium, please provide the combined area

Measured in:

- Square feet (ft²)
- Square metres (m²)

MURB AMENITIES

18. Does this building have on-site laundry facilities?

- Yes
- No

19 a) Does this building have one or more rooms dedicated to computer servers?

- Yes
- No – go to Question 20

19 b) What is the area (length by width) of this building’s computer server room(s)?

- If more than one (1) computer server room, please provide the combined area

Measured in:

- Square feet (ft²)
- Square metres (m²)



ENERGY CONSUMPTION

20 a) For the 2016 calendar year, please report the quantity and expenditure for each energy source or domestic water consumed in this building, for the space indicated in question 2.

- Please report expenditures in Canadian dollars
- Exclude fuel or energy used for transportation
- Include taxes, service charges and any rebates (total amount on your utility bill)
- If your landlord pays your energy bills, please consult landlord for values
- Please report electricity generated on-site separately in questions further below

Energy source	Quantity consumed by this building	Unit of measure	Expenditure for energy CAD \$ (omit cents)	Are the energy costs included in your lease payments?
Purchased Electricity		1 Kilowatt-hours (kWh) 2 Megawatt-hours (MWh) 3 Gigajoules (GJ) 4 Other - Please specify	\$.00	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/> N/A
Natural gas				
Light fuel oil				
Diesel (exclude energy used for transportation)				
Kerosene				
Propane or other bottled gas				
District steam from an off-site plant		<input type="checkbox"/> Kilograms (kg) <input type="checkbox"/> Gigajoules (GJ) <input type="checkbox"/> Million British thermal units (MMBtu) <input type="checkbox"/> Other - Please specify		



Energy source	Quantity consumed by this building	Unit of measure	Expenditure for energy CAD \$ (omit cents)	Are the energy costs included in your lease payments?
District hot water from an off-site plant		<input type="checkbox"/> Gigajoules (GJ) <input type="checkbox"/> Million British thermal units (MMBtu) <input type="checkbox"/> Other - Please specify		
District chilled water from an off-site plant		<input type="checkbox"/> Gigajoules (GJ) <input type="checkbox"/> Million British thermal units (MMBtu) <input type="checkbox"/> Other - Please specify		
Wood		<input type="checkbox"/> Full cords <input type="checkbox"/> Pellets (tonnes) <input type="checkbox"/> Tonnes (metric) <input type="checkbox"/> Pounds (lbs) <input type="checkbox"/> Other - Please specify		
Other energy source consumed - Please specify		<input type="checkbox"/> Litres (L) <input type="checkbox"/> Cubic metres (m3) <input type="checkbox"/> Gigajoules (GJ) <input type="checkbox"/> Million British thermal units (MMBtu) <input type="checkbox"/> Other - Please specify		
Domestic water	Quantity consumed by this building	Unit of measure	Expenditure for domestic water CAD \$ (omit cents)	Are the water costs included in your lease payments?
Domestic water consumed	Not metered	<input type="checkbox"/> Litres (L) <input type="checkbox"/> Cubic metres (m3) <input type="checkbox"/> Other - Please specify	\$.00	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partial <input type="checkbox"/> N/A



20 b) Does the energy use you reported in 20 a) account for all the energy consumed by this building, including all tenant space and common areas?

- Yes
- No, some of the building's energy consumption is missing

21. Please select all spaces included in your energy data (fill in all that apply)

- Entire common area space
- Some common area space (e.g. outdoor lighting only)
- All residential (tenant) spaces
- Some residential (tenant) spaces
- All retail/commercial space
- Some retail/commercial space

22. Estimate the percentage of energy consumption that you provided for the spaces filled in above.

- 0-25%
- 26-50%
- 51-75%
- 76-100%

Note: for example a 100 unit multifamily property that has a full year of data for 90 of its residential units would be estimated to represent the energy consumption for 76-100% of the property

23. For the 2016 calendar year, which types of energy usage were not included in 20 a)?

Mark all that apply:

- Heating of space
- Plug load and lighting (electricity)
- Water heating (water used for consumption)
- Cooling of space
- Other usage – Please specify: _____

24. For energy not reported above, please estimate the amount of floor space that this represents.

25. Is any of the energy reported in 20 a) used by other buildings such as a multi-building?

- Yes
- No



26. What is the approximate area of the buildings that are included in these figures?

Area measured in:

- Square feet (ft²)
- Square metres (m²)

27. Does this building use electric power generated on-site?

- Include emergency power generation

- Yes
- No

28. What energy sources were used for on-site electric power generation?

Energy source	Energy source(s) for on-site electricity generation Mark all that apply
Natural gas	
Light fuel oil, diesel, kerosene	
Propane or other bottled gas	
Wood	
Solar	
Other energy source for electricity generation – Please specify	

29. During the 2016 calendar year, how much electricity was generated on-site, including emergency generator usage?

Measured in:

- Kilowatt-hour (kWh)
- Gigajoules (GJ)
- Other – please specify: _____

30. Is the electric power generation system also a cogeneration system (i.e. does it provide useful heat to the building)?

- Cogeneration is defined as the simultaneous generation of electricity and useful thermal energy (e.g. steam) in one process and from the same fuel source. Types of cogeneration units/systems include condensing steam turbines, combined cycle gas turbines, etc.

- Yes
- No



31. Is the electric power generation system connected to the grid (i.e. can you sell surplus generated energy back to a utility company or energy provider)?

- Yes
- No

32. During the 2016 calendar year, how much energy was sold back to a utility company or energy provider?

Measured in:

- Kilowatt-hour (kWh)
- Gigajoules (GJ) C17002
- Other – please specify: _____

33. During the 2016 calendar year, what was the principal energy source used for heating space in the building?

- The principal energy source is the source used to heat the largest proportion of floor area in this building.

Energy source	Principal energy source for heating Mark one only
Electricity	
Natural gas	
Light fuel oil	
Diesel	
Kerosene	
Propane or other bottled gas	
District steam from an off-site plant	
District hot water from an off-site plant	
Wood	
Solar	
Other energy source for heating space – Please specify	
None - building not heated	

34. During the 2016 calendar year, what was the principal energy source used for cooling space in this building?

- The principal energy source is the source used to cool the largest proportion of floor area in this building.

Energy source	Principal energy source for cooling Mark () one only
Electricity	
Natural gas	
District chilled water from an off-site plant	
Other energy source for cooling space – Please specify	
None - building not cooled	



35. During the 2016 calendar year, what as the principal energy source used for domestic water heating in this building?

- Domestic water heating includes water used for washing hands, dishwashers, etc.
- Exclude water used for heating space in this building

Energy source	Principal energy source for water heating Mark one only
Electricity	
Natural gas	
Light fuel oil	
Diesel	
Kerosene	
Propane or other bottled gas	
District steam from an off-site plant	
District hot water from an off-site plant	
Wood	
Solar	
Other energy source for domestic water heating – Please specify	
None - no hot water available	

36. Which of the following energy conservation and/or energy efficiency practices have been adopted or undertaken in this building?

Mark all that apply:

- No practices were adopted
- Energy monitoring/benchmarking (i.e. track over time)
- Employee/occupant conservation awareness program
- Recommissioning project (project to ensure all heating or cooling systems are performing at optimal levels)
- Corporate energy policy
- Other – Please specify: _____

37. Does this building track its energy use over time?

- Yes
- No – go to question 40

38. Which system do you use to track your building’s energy use over time?

Mark all that apply:

- Spreadsheet developed in-house
- ENERGY STAR® Portfolio Manager
- Bill comparison
- Other tracking system – Please specify: _____



39. Which of the following energy-efficient features are currently present in this building?

Mark all that apply:

- No energy-efficient features
- Reduction of enclosed floor space
- Lighting
- Lighting energy management-control system
- Heating equipment
- Heating and cooling management control system
- Cooling equipment
- Other – Please specify: _____
- Insulation of basement, roof or walls
- Windows

Energy Conservation

40. Please indicate which of the following renovations or retrofits were executed in this building.

No renovations or retrofits since 2009

Changes to the buildings	Completed between 2009 and 2016	Replaced with a more efficient system	Percentage (%) of total floor area affected by renovation or retrofit
Lighting equipment	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	%
Lighting energy management control system	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No (same efficiency) <input type="checkbox"/> No prior system	%
Heating equipment (boiler, furnace, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	%
Cooling equipment	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	%
Heating and cooling management control system (HVAC EMCS)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No (same efficiency) <input type="checkbox"/> No prior system	%
Insulation	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	%
Windows	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	%

41. How are the renovations for this building financed?

Mark all that apply:

- Self-financed
- Loan
- Energy performance contract



Subsidized with incentives

Other – Please specify: _____

Commercial Space

42. Does this MURB have commercial space?

Yes

No – please go to end of questionnaire

43. Please indicate the number of operating hours for this building during a typical week in 2016.

- Please exclude any time when maintenance, housekeeping, or security staff are working outside of the normal operating hours. If the hours vary from different parts of the building, report for that area which is open the longest.

Hour(s) during a typical week in 2016: _____

44. How many employee(s) worked in the building during its main shift in 2016?

- By main shift, we mean the shift when the most employees are in the building
- If the number of employee(s) changes depending on the season, report for the main shift during the busiest season
- Include part-time and full-time employees
- Exclude contractors and volunteers

Total employee(s): _____

45 a) Does this building have walk-in refrigerators and/or freezers?

Yes

No

45 b) What is the total area of the walk-in refrigerator(s) and/or freezer(s)?

Area measured in:

Square feet (ft²)

Square metres (m²)

46 a) Does this building have a commercial or institutional food preparation area?

- Exclude staff kitchens

Yes

No



46 b) What is the total floor area (length by width) in use for commercial or institutional food preparation?

- If more than one preparation area, please provide the combined total area

Area measured in:

- Square feet (ft²)
- Square metres (m²)

THANK YOU FOR PARTICIPATING IN THIS SURVEY

First Name of person to contact about this questionnaire: _____

Last name of person to contact about this questionnaire: _____

Telephone Number: _____ Extension: _____

Facsimile Number: _____

Email Address: _____

Website Address: _____

Date: _____

(YYYY-MM-DD)



ANNEX “B” – BASIS OF PAYMENT

1. Pricing Details to be Provided in Financial Proposal

The Bidder is to details their financial proposal below, identifying the Category of Personnel. Bids will be evaluated on the final total of the Financial Proposal

A	B	C	D (BxC)
Category of Personnel	Per Diem Rate(s)	Estimated Level of Effort/Number of Days Required	Total Estimated Costs for Professional Fees
1. Project Manager	\$		\$
2. Methodologist	\$		\$
3. Programmer	\$		\$
4. Other support staff	\$		\$
Total of Financial Proposal:			\$

Firm Per Diem Rate(s) (also known as daily rate) - The Firm Per Diem Rate(s) is based on 7.5 hours (seven hours and 30 minutes) exclusive of meal breaks with no provision for annual leave, statutory holidays and sick leave. For work performed for a duration of more or less than one (1) day, the daily rate will be prorated accordingly to cover actual time worked.

The Per Diem Rate(s) is ‘all inclusive’ inclusive of travel expenses on project business outside the National Capital Region (that is pre-approved by the NRCAN Project Authority), and excluding GST. Charges for expenses which are normally incurred in the provision of services, such as labour for conducting negotiations and providing estimates, resolving contract disputes, tracking time sheets, monthly invoicing, facsimile, copying/printing charges, office supplies, computer hardware and software charges, courier, long distance telephone charges, travel from a personal residence to the NRCAN site in the National Capital Region, local travel and the like, must be included in the rates and will not be permitted as additional charges to the contract.



ANNEX "C" - SECURITY REQUIREMENT CHECKLIST (SRCL)

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for ticket 133295
Contract Number / Numéro du contrat
133 295
Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: **NRCAN/RNCan**

2. Branch or Directorate / Direction générale ou Direction: **OEE**

3. a) Subcontract Number / Numéro du contrat de sous-traitance

3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail
Conduct a survey of whole building energy consumption in multi-unit residential buildings for the reference year 2016. The survey will be conducted in 8 CMAs within Canada.

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? No / Non Yes / Oui

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? No / Non Yes / Oui

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? No / Non Yes / Oui

6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? No / Non Yes / Oui

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
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7. b) Release restrictions / Restrictions relatives à la diffusion

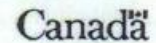
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays:	Specify country(ies) / Préciser le(s) pays:	Specify country(ies) / Préciser le(s) pays:

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui
Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:
Commentaires spéciaux : Personnel will have access to respondents' replies to the questionnaires

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.
REMARQUE: Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

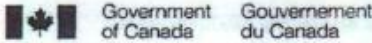
INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



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PART C - (continued) / PARTIE C - (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions.
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC						
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET	
											A	B	C				
Information / Abois / Renseignements / Biens / Production	✓																
IT Media / Support TI	✓																
IT Link / Lien électronique	✓																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED? / La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED? / La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



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PART D - AUTHORIZATION / PARTIE D - AUTORISATION

13. Organization Project Authority / Chargé de projet de l'organisme

Name (print) - Nom (en lettres moulées) Marie Lyne Tremblay	Title - Titre Deputy Director, Office of Energy Efficiency	Signature <i>Marie Lyne Tremblay</i>
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Telephone No. - N° de téléphone 343-292-6382	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel marie.lyne.tremblay@canada.ca	Date 12 July 2016
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14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées) MONIQUE FAUCHER	Title - Titre Manager, Pr. Sec.	Signature <i>Monique Faucher</i>
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Telephone No. - N° de téléphone 343-292-8084	Facsimile No. - N° de télécopieur 613-947-2360	E-mail address - Adresse courriel Monique.Faucher@canada.ca	Date August 22 2016
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15. Are there additional instructions (e.g. Security Guide, Security Classification Guide) attached?
Des instructions supplémentaires (p. ex. Guide de sécurité, Guide de classification de la sécurité) sont-elles jointes?

No / Non Yes / Oui

16. Procurement Officer / Agent d'approvisionnement

Name (print) - Nom (en lettres moulées) Valerie Holmes	Title - Titre Procurement Specialist	Signature <i>Valerie Holmes</i>
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Telephone No. - N° de téléphone (343) 292-8371	Facsimile No. - N° de télécopieur (613) 947-5477	E-mail address - Adresse courriel valerie.holmes@canada.ca	Date August 18, 2016
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17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées) Marie Mendoza Contract Security Officer, Contract Security Division Maria.Mendoza@tpsgc-pwgsc.gc.ca	Title - Titre	Signature <i>Maria Mendoza</i>
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Telephone No. - N° de téléphone (343) 292-8646	Facsimile No. - N° de télécopieur 613-954-4343	E-mail address - Adresse courriel	Date Aug. 23, 2016
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