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PART 1 – GENERAL INFORMATION

1. Introduction

This Request for Supply Arrangement (RFSA) is divided into six (6) parts plus attachments and/or annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Supplier Instructions: provides the instructions applicable to the clauses and conditions of the RFSA;

Part 3 Arrangement Preparation Instructions: provides Suppliers with instructions on how to prepare the arrangement to address the evaluation criteria specified;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement and the basis of selection;

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided; and

Part 6 6A – Supply Arrangement, 6B – Bid Solicitation and 6C – Resulting Contract Clauses.

6A - includes the Supply Arrangement (SA) with the applicable clauses and conditions;

6B – includes the instructions for the bid solicitation process within the scope of the SA;

6C – includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

Annexes include:

Annex “A” – Statement of Work;

Appendix “1” – Project Summary Form

Appendix “2” – Proposed Resources

Annex “B” – Basis of Payment

Annex “C” – Security Requirement Checklist

2. Summary

NRCan has a need to put in place a Request for Supply Arrangement (RFSA) for the delivery of various services required on an “as and when required” basis by NRCan, in support of NRCan’s Greening Government Technical Support Services.

This Request for Supply Arrangement will provide NRCan and all of the federal organizations with a list of experts able to offer services, at any given time, in the following streams:

Stream 1 a) Energy Performance Contracting (EPC), Retrofits; and
b) Renewable Energies and Innovative Technologies

Stream 2 Policy Advice and Managerial Support Services

2.1 Security Requirement

There are security requirements associated with this requirement. For more information on personnel and organization security screening or security clauses, Suppliers 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 Trade Agreements

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

2.3 Comprehensive Land Claims Agreement

The Request for Supply Arrangements (RFSA) is to establish supply arrangements for the delivery of the requirement detailed in the RFSA to the Identified Users across Canada, including areas subject to Comprehensive Land Claims Agreements (CLCAs).

3. Security Requirements

1. At the Request for Supply Arrangements closing date, the following conditions must be met:
 - (a) the Supplier must hold a valid organization security clearance as indicated in Part 6A - Supply Arrangement;
 - (b) the Supplier's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6A - Supply Arrangement;
 - (c) the Supplier 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, Suppliers 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.

4. Debriefings

Suppliers may request a debriefing on the results of the request for supply arrangements process. Suppliers should make the request to the Supply Arrangement Authority within 15 working days of receipt of the results of the request for supply arrangements process. The debriefing may be in writing, by telephone or in person.



PART 2 – SUPPLIER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Supply Arrangement (RFSA) by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](#) issued by Public Works and Government Services Canada.

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the clauses and conditions of the Supply Arrangement and resulting contract(s).

The **2008 (2017-04-27), Standard Instructions – Request for Supply Arrangements – Goods or Services**, are incorporated by reference into and form part of the RFSA.

At Subsection 5.4 – Submission of Arrangements of 2008 (2017-04-27), Request for Supply Arrangements – Goods or Services is amended as follows:

DELETE: 60 days
INSERT: 120 days

At Section 6 – Late Arrangements of 2008 (2017-04-27), Request for Supply Arrangements – Goods or Services is amended as follows:

DELETE: PWGSC
INSERT: NRCan

At Subsection 8.1 – Transmission by Facsimile of 2008 (2017-04-27), Request for Supply Arrangements – Goods or Services is amended as follows:

DELETE: 819-997-9776
INSERT: 613-995-2920

1.1 *SACC Manual Clauses*

SACC Manual Clause S0010C (2012-07-16) – Periodic Usage Reports – Supply Arrangement

2. Submission of Arrangements

Arrangements must be submitted only to Natural Resources Canada (NRCan) Bid Receiving Unit by the date, time and place indicated on Page 1 of the Request for Supply Arrangements.

Due to the nature of the Request for Supply Arrangements, transmission of arrangements by facsimile to NRCan will not be accepted.

It is requested that the Bidder's name, return address, Request for Supply Arrangement Number and 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 identified on Page 1. Not complying with the above instructions may result in NRCan's inability to ascertain reception date and/or consider the bid prior to supply arrangement award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.



3. Former Public Servant – Notification

Service contracts awarded to former public servants in receipt of a pension or a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. Therefore, the bid solicitation will require that you provide information that, were you to be the successful bidder, your status with respect to being a former public servant in receipt of a pension or a lump sum payment, will be required to report this information on the departmental websites as part of the published proactive disclosure reports generated in accordance with Treasury Board policies and directives on contracts with former public servants, [Contracting Policy Notice 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

4. Federal Contractors Program for Employment Equity – Notification

The Federal Contractors Program (FCP) for employment equity requires that some contractors make a formal commitment to Employment and Social Development Canada (ESDC) - Labour to implement employment equity. In the event that this Supply Arrangement would lead to a contract subject to the Federal Contractors Program (FCP) for employment equity, the bid solicitation and resulting contract templates would include such specific requirements. Further information on the Federal Contractors Program (FCP) for employment equity can be found on [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

5. Enquiries – Request for Supply Arrangements

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

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

6. Applicable Laws

The Supply Arrangement (SA) and any contract awarded under the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of the arrangement, 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 Suppliers.



PART 3 – ARRANGEMENT PREPARATION INSTRUCTIONS

1. Arrangement Preparation Instructions

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.

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

HARD COPY:

Section I: Technical Bid – 4 copies (1 original, 3 copies)

Section II: Certifications – 1 copy

OR:

ELECTRONIC STORAGE MEDIA (Preferred Method):

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 – 4 copies (1 original, 3 copies)

NOTE: 1 CD/DVD/USB will contain: 1 Technical, Certifications and signed first page
3 CD/DVD/USB will contain: just the Technical Bid

Section II: Certifications – 1 copy (included with original Technical Bid)

Note: NRCan will accept either Hard copy or Electronic Storage Media submitted bids. However, it is NRCan's preference that bids be submitted on Electronic Storage Media in order for us to adhere to our Green Initiative.

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

All fees, associated with the transfer of data or of all documents as may be required by NRCan as part of the solicitation process, are the responsibility of the Bidder. No costs incurred by the Bidder before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resulting contract.

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.

b) **Format of Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid :

- i. use 8.5 x 11 inch (216 mm x 279 mm) paper;
- ii. use a numbering system that corresponds to the bid solicitation;
- iii. include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
- iv. Include a table of contents.



- c) **Canada’s Policy on Green Procurement:** The policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process See the [Policy on Green Procurement \(http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html\)](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html). To assist Canada in reaching its objectives, bidders 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.

Section I: Technical Arrangement

In the technical arrangement, Suppliers should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Section II: Certifications

Suppliers must submit the certifications required under Part 5.

Section III: Additional Information

Supplier’s Proposed Sites or Premises Requiring Safeguarding Measures

As indicated in Part 1 under Security Requirements, the Supplier must provide the full addresses of the Supplier’s and proposed individuals’ sites or premises for which safeguarding measures are required for Work Performance:

- Street Number / Street Name, Unit / Suite / Apartment Number
- City, Province, Territory / State
- Postal Code / Zip Code
- Country

The Company Security Officer (CSO) must ensure through the [Industrial Security Program \(ISP\)](#) that the Supplier and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 1, clause 1.3, Security Requirements.



PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

- a) Arrangements will be assessed in accordance with the entire requirement of the Request for Supply Arrangements including the technical evaluation criteria.
- b) An evaluation team composed of representatives of Canada will evaluate the arrangements.

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 will be given no further consideration

Proposals **MUST** demonstrate compliance with all of the following Mandatory Requirements and **MUST** provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple resources for each category of services.

If a contract for a supply arrangement is issued, the successful Bidder will have the opportunity to add or replace resources at any time, providing that a CV identifying the skills and competencies of the resources are well documented, and are supplied to the Project Authority before the start of any project. All additional or replacement personnel will be evaluated based on the mandatory and point rated criteria of this RFSA. These criteria must be met at all times for the duration of the supply arrangement.

NOTE: For the purposes of this RFSA, the Bidder may bid to qualify in one (1) or both of the following streams:

- Stream 1**
- a) Energy Performance Contracting (EPC), Retrofits; and
 - b) Renewable Energies and Innovative Technologies

Stream 2 Policy Advice and Managerial Support Services

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

The Bidder may propose two (2) or multiple resources. Should the Bidder wish to replace any of the proposed resources at any time after the SA has been signed, they must submit the same information provided originally for that resource. All additional or replacement personnel will be evaluated on the Mandatory and Point Rated Criteria of this RFSA. These criteria **MUST** be met at all times for the duration of the SA.

STREAM 1			
a) Energy Performance Contracting (EPC), Retrofits			
b) Renewable Energies and Innovative Technologies			
Item	Mandatory Technical Criteria	Met/NotMet	Proposal Page #
M1.1	<p>Proposed Resources:</p> <p>The Bidder MUST provide a Curriculum Vitae (CV) of each and all proposed resources that will participate in the supply arrangement and identify the role of each team member. Each CV should include details demonstrating any relevant experience related to facilitation services carried out by the resource and demonstrate their ability to perform the tasks as described in the Scope of Work (refer to Annex “A” – Statement of Work).</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



STREAM 1			
a) Energy Performance Contracting (EPC), Retrofits			
b) Renewable Energies and Innovative Technologies			
Item	Mandatory Technical Criteria	Met/NotMet	Proposal Page #
	<p>Note: If a resource, identified in the SA, cannot be used for a future mandate, the Bidder will have to qualify and alternative resource prior to the new mandate in order to retain prequalification status and as not to leave the client without service. Any new resource(s) must have at least the same experience to fulfill the commitment of the Bidder.</p>		
M1.2	<p>Experience: The Bidder MUST demonstrate that at least one of the proposed resource has a minimum of five (5) years of experience in providing facilitation services as it relates to:</p> <p>Stream 1</p> <p>a) Energy Performance Contracting (EPC), Retrofits; and b) Renewable Energies and Innovative Technologies</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M1.3	<p>Certification: The Bidder MUST propose at least one resource with the following designations:</p> <ul style="list-style-type: none"> Professional Engineer (P.Eng) or equivalent; or Certified Engineering Technologist (CET); or Certified Energy Manager (CEM) <p>Please provide copies of certificates with the proposal.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M1.4	<p>Capacity: The Bidder MUST demonstrate that it can successfully accommodate multiple projects across Canada, under the RFSa, at any given time.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M1.5	<p>References: The Bidder MUST provide a letter of recommendation, from at least two (2) clients, for whom the Bidder has undertaken facilitation services within the last five (5) years as it pertains to Stream 1 a) or b) that the Bidder is applying for.</p> <p>Note: A letter of recommendation (for Stream 1) is expected for each sub-component, a) and b). The letters must come from clients of the projects submitted under R1.2.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

STREAM 2 – Policy Advice and Managerial Support Services			
Item	Mandatory Technical Criteria	Met/NotMet	Proposal Page #
M2.1	<p>Proposed Resources: The Bidder MUST provide a Curriculum Vitae (CV) of each and all proposed resources that will participate in the supply arrangement and identify the role of each team member. Each CV should include details demonstrating any relevant experience related to facilitation services carried out by the</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



STREAM 2 – Policy Advice and Managerial Support Services			
Item	Mandatory Technical Criteria	Met/NotMet	Proposal Page #
	<p>resource and demonstrate their ability to perform the tasks as described in the Scope of Work (refer to Annex “A” – Statement of Work).</p> <p>Note: If a resource, identified in the SA, cannot be used for a future mandate, the Bidder will have to qualify and alternative resource prior to the new mandate in order to retain prequalification status and as not to leave the client without service. Any new resource(s) must have at least the same experience to fulfill the commitment of the Bidder.</p>		
M2.2	<p>Experience: The Bidder MUST demonstrate that at least one (1) of the proposed resources has a minimum of five (5) years of experience in providing energy performance contracting policy advice and managerial support services. This type of resource must be available at all times for the duration of the supply arrangement.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M2.3	<p>Examples: The Bidder MUST provide three (3) relevant examples of providing energy performance contracting policy advise and managerial support services to program activities within the last five (5) years for the federal / provincial government or private sector.</p> <p>The Bidder MUST provide summaries outlining the activities the proposed resource(s) have worked on for each of the projects. The summaries should include at the least:</p> <ul style="list-style-type: none"> a) An overview of activities undertaken; b) Staff experience and roles; c) Two (2) challenges faced and how they were addressed 	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M2.4	<p>References: The Bidder MUST provide a letter of recommendation, from at least two (2) clients, for whom the Bidder has undertaken facilitation services within the last five (5) years as it pertains to Stream 2.</p> <p>Note: The letters MUST come from clients of the projects submitted under R2.2</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

1.1.2 Point Rated Requirements

The criteria contained herein will be used to evaluate each Proposal that has met **all** of the Mandatory Requirements. Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. The assessment will be based solely on the information contained within the Proposal. NRCan may confirm information or seek clarification from Bidders.

Only those Proposals which are compliant with all of the Mandatory Requirements and then achieve (or exceed) the stated Minimum Points Required for the Rated Requirements Evaluation Criteria Section, will be further considered for award of a Supply Arrangement. Proposals not meeting the Minimum Points Required will be deemed non-responsive and given no further consideration.



Note: Each resource will be evaluated according to Stream 1a) or Stream 1b). In order to be awarded a Supply Arrangement, the Bidders must have resources that will pass the minimum score in Streams a) and b)

STREAM 1				
a) Energy Performance Contracting (EPC), Retrofits				
b) Renewable Energies and Innovative Technologies				
Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1.1	Proposed Approach to Providing Facilitation Services to the Federal Government			
	<p>The Bidder should describe the approach they would use to assist a federal government client in reviewing the need for, developing and implementing:</p> <ul style="list-style-type: none"> • Energy Performance Contract (EPC) project; • Renewable Energy and Innovative Technologies Projects; <p>The description of the approach should include details on how the Bidder will guide the client through each process and the roles of the project team and its proposed resources as well as details on entities (other firms) you may team with (joint venture).</p> <p>The description of the approach should demonstrate that the Bidder understands how to develop:</p> <ul style="list-style-type: none"> • Energy performance contracts; • Energy savings projects; and • Renewable energy and innovative technologies from project identification to project implementation within an institutional or commercial building environment. <p>This description should not exceed six (6) pages. NRCan reserves the right to only review the first six (6) pages of the Bidders' proposal</p>	<p>To obtain full marks all categories of facilitation services are included in the approach (as per section SW3.2 of Annex "A" – Statement of Work)</p> <p>The description of the approach will be evaluated against the following factors (see evaluation grid below):</p> <p>A clear and logical step-by-step approach, which demonstrates a thorough knowledge of the processes. (as defined in SW3.2.1, SW3.2.2, SW3.2.3 and SW3.2.4 of Annex "A" – Statement of Work)</p> <p>The description identifies a clear and well explained client relationship approach (such as understanding and identifying client needs)</p> <p>The description of the process includes a thorough description of the roles and responsibilities of the Bidder's resources</p>	10	
R1.2	Experience in Delivering Facilitation Services			
	<p>The Bidder should demonstrate that they have successfully facilitated and offered facilitation services to clients:</p>	<p>Bidder shall be evaluated based on a thorough description of completeness of project information; types and breadth of services</p>	10	



	<ul style="list-style-type: none"> At least three (3) relevant Energy Performance Contracting projects within the last five (5) years for federal or provincial government or private sector. At least three (3) relevant Renewable Energies and Innovative Technologies projects within the last five (5) years for the federal or provincial governments or private sector. <p>The Bidder should demonstrate their ability to provide facilitation services to clients.</p> <p>The Bidder should complete a Project Summary Form for each project (refer to Appendix “1”). These project summaries will/may be used during the evaluation of the proposed resource (see R1.3).</p> <p>It is the Bidder’s responsibility to ensure that the evaluation committee will be able to clearly identify how the experience was acquired, and by which entity (if working with other firms).</p>	<p>provided, relevant obstacles / challenges encountered, timelines of project delivery (see evaluation grid below)</p>		
R1.3	Proposed Resources:			
	<p>Using the information provide in M1.1, M1.2, M1.3 and R1.2 the resource(s) proposed by the Bidder will be evaluated based on the below point rated criteria (R1.3a to R1.3c)</p> <ul style="list-style-type: none"> The details demonstrate how the proposed resource(s) obtained the experience and should include the following: <ul style="list-style-type: none"> Duration of time (e.g. months, years) Dates The role and responsibilities; Dollar value of projects or budgets; Description of the work, including the scope; Evidence that the work was delivered on time and on budget; 	<p>Maximum 15 points for Stream 1a</p> <p>Maximum 15 points for Stream 1b</p> <p>In each of the point rated criteria below (R1.3a to R1.3c), the Bidder will receive full marks if the description shows that:</p> <ul style="list-style-type: none"> The resources has experience in delivering the majority of activities in each of the point rated criteria The descriptions are well documented and 	15	



	<ul style="list-style-type: none"> Impact of its advice on the project results <p>All Bidders are advised that only listing experience without providing any supporting details to describe where and how such experience was obtained will not be considered to be “demonstrated” for the purpose of the evaluation. All professional experience is to be fully documented and substantiated in the Offer(s).</p> <p>Important Note: A resource can apply on R1.3a (EPCS) or R1.3b (Renewable Energy and Innovative Technologies) or both. The Bidder will have, at all times, resources that can facilitate the implementation of EPCs and renewable energy / innovative technology projects in order to hold a Supply Arrangement.</p>	<p>detailed with regard to the roles and the tasks, as requested in each criteria; and</p> <ul style="list-style-type: none"> The impact of the results of each task are well understood and concisely documented 		
R1.3a	a) Resource Experience in Facilitating the Implementation of Energy Performance Contracts (EPCs) Projects:			
	<p>The Bidder should demonstrate that the proposed resource has worked with project authorities (clients) in facilitating the implementation of energy performance contracts (EPCs) by performing the following tasks/ services:</p> <ul style="list-style-type: none"> - Determine client objectives and needs - Perform preliminary energy audits (Opportunity Assessments), ASHRAE Level 1 or Level 2 energy audit; - Assist with the development of statements of works for EPCS (major energy efficiency retrofits where the energy savings are guaranteed) requests for proposals and/or contracts; - Provide support in the analysis, evaluation, financing assessment and negotiation in reviewing proposals received from EPCs; - Provide advice and expertise on the selection of energy services companies (ESCO)s or energy efficiency contractor; - Develop baseline information for energy retrofit projects; - Assist with the review of feasibility studies; 	<p>Maximum 10 points (see Evaluation Grid below)</p> <p>To obtain full marks, the proposed resource(s) will have at least five (5) years of experience in facilitating the implementation of EPCS and the resource will have demonstrated meeting all of the areas identified.</p>	10	



	<ul style="list-style-type: none"> - Review or develop the M&V plan to ensure compliance with EPC requirements; - Provide advice on M&V and reconciliation report for energy savings; - Facilitate/provide training on EPC, energy management, M&V and/or assist with the development of training materials and/or guidelines for building operators, employees and maintenance personnel. <p>The experience of the resource could concern the three (3) EPC projects submitted for R1.2 or other EPC project facilitated during the last five (5) years.</p>			
R1.3b	b) Resource Experience in Facilitating the Implementation of Renewable Energies and Innovative Technologies (REIT) Projects:			
	<p>The Bidder should demonstrate that the proposed resource has worked with project authorities in facilitating the implementation of Renewable Energies and Innovative Technologies Projects. The resource will have performed the following tasks/services:</p> <ul style="list-style-type: none"> - Provide advice to client organizations in the integration of renewable energy or innovative technologies in their facilities; - Help governmental or private organizations determine objectives and needs with respect to renewable energy technologies and/or innovative technologies; - Review existing building documentation and perform on-site assessments; - Complete energy efficiency analysis; - Complete structural feasibility and analysis; - Complete mechanical and electrical feasibility and analysis; - Complete economic feasibility and financing analysis; - Estimate an appropriate schedule for implementation <p>The experience of the resource should concern the three (3) REIT projects</p>	<p>Maximum 10 points (See Evaluation Grid below)</p> <p>To obtain full marks, the proposed resource(s) will have at least five (5) years of experience in facilitating the implementation of REIT projects and the resource will have demonstrated meeting all of the areas identified</p>	10	



	submitted for R1.2 or other REITs project facilitated during the last five (5) years.			
R1.3c	Project Facilitation Experience for Stream 1 a) and b):			
	<p>The Bidder should demonstrate that the proposed resource provided general project management support relevant to EPCs and/or to REIT Projects in the commercial and/or institutional building sectors.</p> <p>The resource should provide information about their role and tasks performed related to project management support (design and planning of EPCs or REIT projects, preliminary assessment of retrofit measures or technologies), support for the procurement / evaluation / selection of contractors, monitoring the final results in terms of energy and GHG reduction</p>	<p>Maximum 5 Points</p> <p>To obtain full marks, the proposed resource will have demonstrated meeting all of the areas identified</p>	5	
Total Points Available for Stream 1 a) (does not include R1.3b)			35	
Total Points Available for Stream 1 b) (does not include R1.3a)			35	
Minimum Points Needed to be Considered Compliant (60%) under each stream			21	

STREAM 2 – Policy Advice and Managerial Support Services				
Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder’s proposal and/or CV. Clearly identify where information can be found
R2.1	Approach to Energy Performance Contracting Policy Advice and Managerial Support Services			
	<p>The Bidder should describe the approach it proposes to use for providing energy performance contracting policy advice and managerial support services to “NRCan Greening Government Technical Support Services”.</p> <p>The description of the approach should include details on how the Bidder will assist NRCan staff in its program management activities through providing policy advice and/or managerial support services, the benefits and challenges of the approach, the role of the proposed resources, the allocation of resources as well as other details that help to understand the approach.</p>	Maximum 10 points	10	



STREAM 2 – Policy Advice and Managerial Support Services				
Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder’s proposal and/or CV. Clearly identify where information can be found
	<p>The description of the approach should demonstrate that the Bidder understands how Treasury Board policies and regulations impact energy performance contracting in the federal built environment. The description of the approach should also demonstrate that the Bidder understands how EPC tools and model documents can be used synergistically to support adoption of energy performance contracting principles in other sectors of the Canadian economy.</p> <p>Previous experience with and/or knowledge of the Federal Buildings Initiative is considered an asset.</p>			
R2.2	Experience with Providing Energy Performance Contracting Policy Advice and Managerial Support Services to Program Activities			
	<p>As per M2.3 of Stream 2, Bidder’s will be evaluated based on the information provided in the examples. Bidder’s will be rated on the following:</p> <ul style="list-style-type: none"> • Relevancy of examples • Completeness of summaries • Demonstration of experience 	Maximum 10 points	10	
R2.3	Experience of Proposed Resource(s)			
	<p>As per M1.1 of Stream 2, the proposed resources will be evaluated based on the information provided in the submitted CV’s. Each resource will be evaluated separately and must obtain at least the minimum overall score under R2.3 (60%) in order to be included on the pre-qualified list. Each criterion is worth a maximum of 5 points each.</p> <p>The Bidder is to provide all relevant details for each point-rated requirement (R2.3a to R2.3c):</p> <ul style="list-style-type: none"> • duration of time (e.g. months, years) and dates; • the role and responsibilities • dollar value of projects or budgets • description of the work, including scope 	Maximum 15 points for R2.3 a-c	15	



STREAM 2 – Policy Advice and Managerial Support Services				
Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder’s proposal and/or CV. Clearly identify where information can be found
R2.3a	<p>The Bidder should demonstrate that the proposed resource provided policy advice and consultation services in the area of energy performance contracting or on renewable energies and innovative technologies or energy retrofits in the commercial and/or institutional buildings sector. This includes, but is not limited to:</p> <ul style="list-style-type: none"> • assisting project authorities in meeting its overall energy efficiency objectives • preparing policy documents and position papers in support of new program initiatives related to energy performance contracting or renewable energies and innovative technologies. • preparing executive decision-making documents such as Treasury Board submissions in support of energy efficiency retrofit projects • identifying and resolving policy issues that could impact energy efficiency as they pertain to the built environment • providing policy advice on Treasury Board contracting requirements and regulations respecting EPC, and • providing technical advice on the application of energy performance contracts and related policies. 			
R2.3b	<p>The Bidder should demonstrate that the proposed resource worked with project authorities to support the adoption of energy performance contracting principles within various sectors of the Canadian economy, especially within the institutional sectors (municipalities, universities, schools and hospitals), through the adoption of EPC tools and model documents in these sectors, and through identification of opportunities for collaborative synergy between the sectors and private sector suppliers of energy management services</p>			
R2.3c	<p>The Bidder should demonstrate that the proposed resource has experience</p>			



STREAM 2 – Policy Advice and Managerial Support Services				
Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder’s proposal and/or CV. Clearly identify where information can be found
	conducting research on energy performance contracting or on renewable energies and innovative technologies /or on buildings energy retrofits. This includes, but is not limited to, market research reports and market entry strategies			
Total Points Available:			35	
Total Points Needed to be Considered Compliant (60%)			21	

EVALUATION GRID	
Excellent (100%)	Rated criteria are covered in-depth and submitted information demonstrates a complete and deep understanding of all rated criteria elements.
Very good (80%)	Submitted information clearly indicates a full understanding of all rated criteria elements.
Good (60%)	Submitted information clearly indicates a full understanding of most of rated criteria, but not all
Unsatisfactory (40%)	Submitted information indicates some understanding of criteria outlines, but does not demonstrate a full understanding of all rated criteria.
Poor (20%)	Submitted information indicates that the Bidder has minimal understanding of the criteria outlines.
Unacceptable (0%)	Submitted information does not meet criteria

2. Basis of Selection

Supply Arrangements (SA) will be issued to Suppliers who meet all of the Mandatory Requirements and achieve the minimum score identified in the Point Rated Requirements. These Bidders will be deemed to be qualified firms for the purposes of performing the services.

Receipt of a Supply Arrangement does **NOT** automatically mean that the Supplier will receive subsequent Contracts. RFPs will be sent to successful suppliers as and when required by NRCan and its federal clients.



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Suppliers must provide the required certifications and additional information to be issued a supply arrangement (SA).

The certifications provided by Suppliers to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an arrangement non-responsive, or will declare a contractor in default if any certification made by the Supplier is found to be untrue whether made knowingly or unknowingly during the arrangement evaluation period, or during the period of any supply arrangement arising from this RFSA and any resulting contracts.

The Supply Arrangement Authority will have the right to ask for additional information to verify the Supplier’s certifications. Failure to comply and to cooperate with any request or requirement imposed by the Supply Arrangement Authority will render the arrangement non-responsive, or constitute a default under the Contract.

1. Certifications Required with the Arrangement

Suppliers must submit the following duly completed certifications as part of their arrangement.

1.1 Integrity Provisions – Declaration of Convicted Offences

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

2. Additional Certifications Required with the Arrangement

2.1 Integrity Provisions – List of Names

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

- 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 or, in the case of a private company, the owners of the company.
- 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 partnerships do not need to provide lists of names.
Name of Bidder: _____

OR

Name of each member of the joint venture:

- Member 1: _____
- Member 2: _____
- Member 3: _____
- Member 4: _____



Identification of the administrators/owners:

SURNAME	NAME	TITLE

3. Certifications Precedent to the Issuance of a Supply Arrangement and Additional Information

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

Who is eligible?

a) 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

b. 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.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

- Our Company is NOT an Aboriginal Firm, as identified above.
- Our Company is an Aboriginal Firm, as identified above. The supplier must complete the certificate in the appropriate clause below.

SACC Manual clauses [A3000T](#), [A3001T](#), [M3030T](#), [M9030T](#), [S3035T](#) and [S3036T](#) contain a certification that suppliers must complete and submit with their bid/offer/arrangement. Failure by suppliers to submit this completed certification form with their bids/offers/arrangements may render the bid/offer/arrangement non-responsive.

Signature of Authorized Representative

Date



PART 6 – SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

A) SUPPLY ARRANGEMENT

1. Arrangement

The Supply Arrangement covers the work described in Annex “A” – Statement of Work.

2. Security Requirements

The following security requirements (SRCL) and related clauses provide by ISP) apply and form part of the Supply Arrangement

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

PWGSC FILE #: 139787-17-097

1. The Contractor/Offeror must, at all times during the performance of the Contract/Supply Arrangement, 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. Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by CISD, PWGSC, the Contractor personnel **MAY NOT ENTER** sites without an escort.
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.
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)

2.1 *Supplier's Sites or Premises Requiring Safeguarding Measures*

Where safeguarding measures are required in the performance of the Work, the Supplier must diligently maintain up-to-date the information related to the Supplier's and proposed individuals' sites or premises, for the following addresses:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

The Company Security Officer (CSO) must ensure through the Industrial Security Program (ISP) that the Contractor and individual(s) hold a valid security clearance at the required level.



3. Standard Clauses and Conditions

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

3.1 General Conditions

2020 (2017-07-01) – General Conditions – Supply Arrangement – Goods or Services, apply to and form part of the Supply Arrangement.

At Section 1 – Interpretation of 2020 (2016-04-04), should be amended as follows:

DELETE: Public Works and Government Services Canada

INSERT: Natural Resources Canada

3.2 Supplemental General Conditions

4007 (2010-08-16) – Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of this Supply Arrangement.

Natural Resources Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- *To generate knowledge and information for public dissemination*

NRCan reserves the right to grant, upon written request, a license to exercise the required Intellectual Property Rights in such Canada-owned information to the successful Contractor.

For reference, the Treasury Board Site is: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=13697>

3.2.1 International Sanctions

Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to economic sanctions. Details on existing sanctions can be found at: <http://www.dfait-maeci.gc.ca/trade/sanctions-e.asp>.

It is a condition of this Contract that the Contractor not supply to the Government of Canada any goods or services which are subject to economic sanctions.

By law, the Contractor must comply with changes to the regulations imposed during the life of the contract. During the performance of the Contract should the imposition of sanctions against a country or person or the addition of a good or service to the list of sanctioned countries or the additions of a good or service to the list of sanctioned goods or services cause an impossibility of performance for the Contractor, the situation will be treated by the Parties as a force majeure. The Contractor shall forthwith inform Canada of the situation; the procedures applicable to force majeure shall then apply.



3.2.2 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. (AMC). The parties acknowledge receipt of the rules of AMC. 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.

3.2.3 Withholding Tax of 15 Percent (%)

The Contractor agrees that, pursuant to the provisions of the Income Tax Act, Canada is empowered to withhold an amount of 15% of the price to be paid to the Contractor, if the Contractor is a non-resident Contractor as defined in said Act. This amount will be held on account with respect to any liability for taxes which may be owed to Canada.

3.2.4 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)

3.2.5 Supply Arrangement Reporting

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

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

The data must be submitted on a quarterly basis to the Supply Arrangement Authority.

The quarterly reporting periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31;

4th quarter: January 1 to March 31.



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

4. Term of Supply Arrangement

4.1 Period of the Supply Arrangement

The period for the Supply Arrangement is for a **twelve (12)** month period from Supply Arrangement Award to **September 30, 2018** with **four (4)** additional **twelve (12)** month option periods.

4.2 Option to Extend Supply Arrangement

NRCan reserves the right to extend the period of the Supply Arrangement for up to **four (4)** additional **twelve (12)** month periods, under the same terms and conditions. NRCan may exercise the option, or any extension thereof, at any time by written notice to the Offeror (Contractor) at least 30 calendar days prior to the Supply Arrangement expiry date.

The option may only be exercised by the Project Authority and any extension to the period will be evidenced through a formal Supply Arrangement amendment issued by the Contracting Authority.

5. Authorities

5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Valerie Holmes

Procurement Specialist
Natural Resources Canada
580 Booth Street, 5th Floor
Ottawa, Ontario
K1A 0E4
Tel: 343-292-8371
Fax: 613-947-5477
Email: Valerie.holmes@canada.ca

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable.

5.2 Supplier's Representative

Name:
Title:
Company:
Telephone:
Facsimile:
Email:

6. Identified Users

The Identified User is **Natural Resources Canada**, however we will be acting on behalf of other government entities, as needed.



7. On-Going Opportunity for Qualification

A Notice will be posted once a year on the Government Electronic Tendering Service (GETS) known as Buy and Sell to allow new Suppliers to become qualified. Existing qualified Suppliers, who have been issued a supply arrangement, will not be required to submit a new arrangement.

8. 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 the Supply Arrangement;
- b) the General Conditions 2020 (2017-07-01) – Supply Arrangement – Goods or Services
- c) the Supplemental General Conditions 4007 – Canada to Own Intellectual Property Rights in Foreground Information, and those contained herein;
- d) Annex “A” – Statement of Work
- e) Annex “B” – Basis of Payment
- f) Annex “C” – Security Requirements Checklist
- g) The Supplier’s Arrangement dated _____.

9. Certifications and Additional Information

9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Supplier in its arrangement or precedent to issuance of the Supply Arrangement (SA), and the ongoing cooperation in providing additional information are conditions of issuance of the SA and failure to comply will constitute the Supplier in default. Certifications are subject to verification by Canada during the entire period of the SA and of any resulting contract that would continue beyond the period of the SA.

10. Applicable Laws

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____.

B) BID SOLICITATION

1. Bid Solicitation Documents

The bid solicitation will contain, as a minimum, the following:

- a) Security Requirement (if applicable);
- b) A complete description of the Work to be performed;
- c) **2003 (2017-04-27), Standard Instructions - Goods or Services - Competitive Requirements;**
- d) Bid Preparation Instructions;
- e) Instructions for the submission of bids (address for submission of bids, bid closing date and time);
- f) Evaluation procedures and Basis of Selection;
- g) Financial Capability (if applicable);
- h) Certifications
- i) Conditions of the Resulting Contract



2. Bid Solicitation Process

Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from Suppliers who have been issued a SA.

The bid solicitation will be sent directly to Suppliers.

3. Overview of the Procurement Process

This RFSA is the first of a **two-step** procurement process. At Step 1, the procurement framework for subsequent contracts will be detailed. Suppliers will be evaluated against all criteria contained herein as described in Part 4 – Evaluation Procedures and Basis of Selection and SA's will be issued to those suppliers who are deemed compliant for all the criteria. At Step 2, Contracts will be issued based on the framework as requirements are known.

Step 1 – Request for Supply Arrangement (RFSA) and Issuance of Supply Arrangements

For Step 1, this competitive RFSA is issued on the Government Electronic Tendering System (GETS), also known as Buy and Sell (hereinafter referred to as Buy and Sell). The Evaluation will be conducted in two (2) phases as described in Part 4 – Evaluation Procedures and Basis of Selection.

The SA's will be available for use upon signature by NRCan and will be effective on the same date for a period of one (1) year, with four (4) additional one (1) year option periods. A Supplier will be deemed to have been added to the SA Holders list(s) upon signature of SA.

Step 2 – Issuance of Contracts and Request for Proposals (RFPs)

For Step 2, Contracts will be entered into in accordance with the framework described in the Statement of Work, during the term of the SA.

Thresholds for Directed (Sole Source) Contracts and Competed Requirements

1. Requirements estimated at \$25,000 or less, GST/HST included

The SA Authority (also known as the Contracting Authority) may direct the requirement to a specific SA Holder as per the current Treasury Board Secretariat contracting policy.

2. Requirements estimated over \$25,000 but less than \$250,000, GST/HST included

A minimum of three (3) SA Holders will be invited to submit bids.

Response Period: SA Holders will have a minimum of five (5) calendar days from the date of invitation to submit bids if less than the NAFTA Threshold).

3. Requirements exceeding \$250,000 but no more than \$2M, GST/HST included

ALL SA Holders must be invited to submit bids.

Response Period: SA Holders will have a minimum of fifteen (15) calendar days from date of invitation to submit bids.

Any requirements equal to or exceeding \$400,000.00 will be posted as a Notice of Proposed Procurement (NPP) on Buy and Sell for fifteen (15) calendar days.



NOTE: NRCan reserves the right to supplement the invited pre-qualified SA Holders by inviting additional bidders at its sole discretion, in addition to those pre-qualified in the Supply Arrangement.

C) RESULTING CONTRACT CLAUSES

1. General

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the template used for the bid solicitation.



ANNEX “A” – STATEMENT OF WORK

SW1 Background

In 1991, the Government of Canada launched the Federal Buildings Initiative (FBI), which is operated by Natural Resources Canada’s (NRCan) Office of Energy Efficiency. Through the FBI, NRCan helps federal departments and agencies plan and implement projects that reduce the energy use and greenhouse gas emissions (GHG) in their buildings, laboratories, and other facilities. The FBI provides knowledge, training and expertise that helps custodial departments through the process of undertaking and financing energy efficiency retrofit projects. NRCan also encourages federal organizations to procure efficient equipment, supports the development of energy and GHG management plans, and increase their knowledge through energy and GHG management training to build the department’s institutional capacity to identify energy saving opportunities and act on them.

Key to this program are the tools and services developed to procure the services of energy and GHG management firms to undertake energy efficiency work. Thousands of square meters of federal buildings have been upgraded using the program’s tools and services, leading to improved work environments, reduced GHG and millions of dollars in energy and operational cost savings.

The Federal Sustainable Development Strategy (FSDS), tabled in Parliament on October 6, 2016, is committing the Government of Canada to reduce the GHG emissions generated by its operations by 40% by 2030 compared to 2005 levels, with an aspirational goal of reaching this target by 2025. NRCan Greening Government Technical Support Services, which includes FBI, is assisting federal organizations working toward achieving the GHG reduction target. NRCan will offer energy and GHG management training services to federal employees through external training organizations to help federal organizations reduce energy consumption and related GHG emissions.

SW2 Scope of Work

SW2.1 Objective

This procurement vehicle is for the delivery of various services required on an “as and when requested” basis by NRCan, in support of NRCan Greening Government Technical Support Services.

The scope of this RFSA is to qualify companies to deliver **Client Facilitation Services** to help NRCan assist client organizations plan, develop and implement major energy efficiency retrofit initiatives through the use of energy management, monitoring and verification (M&V), renewables, and energy performance contracts to help meet the FSDS targets.

NRCan provides tools including model contract and bid packages; model long-term energy management plans; technical specification guidelines; and a qualified bidders list for firms to conduct energy efficiency improvements, including energy performance contracting (EPC) to assist departments implement major energy efficiency retrofit projects. In addition, NRCan also provides tools and information including preliminary and comprehensive energy audits, project financing options, project monitoring, assistance with raising employee awareness (for example: implementing an energy efficiency awareness program and training workshops), capacity building resources, including seminars and networking events, publications, case studies, design and analysis tools, recognition and awards.

For more information on NRCan programs, services and support, email: nrcan.fbi-ibf.rncan@canada.ca

SW2.2 Client Facilitation Services

NRCan is seeking proposals to provide client facilitation services to federal organizations to help successfully plan for, implement and proactively manage projects by providing technical expertise and advice on all aspects of energy management.

Facilitators are hired by NRCan to provide specific services to federal client organizations. The facilitator will work closely with the client organization under the supervision of NRCan.



Facilitators' overall responsibilities may include, but are not limited to, providing advice and performing tasks on:

- Energy efficiency's needs assessment of the client organizations, performing preliminary and full energy audits
- Developing energy efficiency projects: liaising with, and assisting federal organizations to define the breadth and scope of possible energy saving projects, including energy recommissioning, major energy efficiency retrofits, adoption of renewable energy technologies within their facilities and helping promote the project to senior management;
- Helping to define, identify or evaluate technology and engineering issues in the development and deployment of an energy management initiative by providing support to federal organizations.
- Providing support in the development of requests for proposals, assessment of bids, development of contract and/or resolution of contractual and funding issues in order to put together and launch an energy performance contract and energy efficiency projects such as renewable energies or innovative technologies;
- Assisting in the development of measurement and verification (M&V) plans or review of M&V processes to ensure the longer term persistence of the energy savings in energy efficiency projects.
- Assisting with the drafting, amending or vetting of procurement instruments such as Requests for Proposals and Model Contracting Documents and in the preparation of decision-making documents such as Treasury Board submissions in support of energy management contracts;
- Providing policy advice on Treasury Board contracting requirements and regulations respecting energy performance contracting and general contracting, procurement and technical advice on the application of the Federal Buildings Initiative and supportive/related policies.

This supply arrangement will provide NRCan and all of the federal organizations with a list of experts able to offer services, at any given time, in the following streams:

Stream 1 a) Energy Performance Contracting (EPC), Retrofits; and
b) Renewable Energies and Innovative Technologies

Stream 2 Policy Advice and Managerial Support Services

For more information, refer to the description of services in sections 3.2.1, 3.2.2, 3.2.2 and the technical evaluation criteria (Part 4

SW2.3 Client Facilitation Services

3.2.1 Stream 1 - a) Energy Performance Contracting¹ (EPC), Retrofits

The suite of services that a Facilitator could be asked to perform while facilitating an **energy performance contract and/or a retrofit** for a federal client is divided into six categories of services. NRCan may request that the Facilitator provide services in all, or some, categories (depending on the client needs) as listed below:

- a) Energy Consumption Assessment and Training
 - Collect, compile and analyze any existing facility information, utility data and reports
 - Perform preliminary energy audit, ASHRAE level 2 and/or 3;
 - Conduct a detailed analysis of the building/facility systems and equipment, operating and maintenance procedures, existing space conditions and assess the potential for reduction in energy consumption and energy demand.

¹ An **energy performance contract** is an agreement between an energy service company (ESCO) and a client organization that is used for energy efficiency retrofit projects. Under this agreement, an ESCO assesses a facility's energy systems and equipment, identifies possible energy savings opportunities, recommends and implements energy efficiency improvements, monitors the results, and guarantees the energy savings. The energy-saving improvements and the ESCO are paid for over a specified period from the resulting energy savings. When the payout period is over, the ESCO's services and all the improvements will have been paid for – and the organization will benefit from all future savings. In the Government of Canada, Energy Performance Contracts are performed in accordance with Treasury Board's contracting policies that authorize any federal contracting authority to enter into and amend a service contract to acquire energy services, which may include energy supply, energy efficiency improvements, management services, energy management monitoring and training, with limits on the maximum amount of such contract.



- Develop concepts of energy efficiency improvements related to but not restricted to: lighting, motors, heating, ventilating and air conditioning, envelope improvements, control systems, fuel conservation, load sharing and load shedding, and water consumption improvements, all based on actual site surveys.
 - List all existing mechanical, electrical, architectural and structural drawings that exist, either as original as-built drawings, or subsequent retrofits of the building.
 - Visit sites, interview site contacts;
 - Propose an implementation schedule of energy conservation measures for the building's energy and determine a revised energy budget based on these recommendations. This schedule shall identify the potential energy savings listed for each conservation measure and the anticipated GHG emission reductions.
 - Develop and deliver presentations to clients and participate in events and meetings;
 - Assist federal organizations with the reporting of their energy use;
- b) Project Development and Strategic Advice
- Provide options for energy reductions strategies including technologies, management approaches to help the client meet their department GHG reduction targets
 - Assist in the development of business cases and other documentation relating to building/facility information
- c) Support for setting up contracts and funding options, in relation to energy performance contracting or energy saving projects such as:
- Assist with the development of statements of work for major energy efficiency retrofit requests for proposals and/or contracts;
 - Assist client organizations with developing Treasury Board Submissions, in accordance with Treasury Board contracting policies, using the FBI templates and program direction.
 - Address engineering design/specification issues, as they relate (but not limited to) to the request for proposal documents; Participate in site visits and bidders conferences as required;
 - Provide definitions and technical requirements needed at the procurement stage;
 - Provide support in the analysis, evaluation, financing assessment and negotiation in reviewing proposals received for energy retrofit projects;
 - Provide advice and expertise on the selection of energy services companies (ESCO)s or energy efficiency contractor;
 - Provide project management, technical support and advice to client organizations up to contract signing stage and/or after, as instructed by NRCan.
- d) Feasibility study and Construction
- Develop the energy baseline information for energy retrofit projects;
 - Assist with the review of feasibility studies;
 - Provide advice and guidance during the construction phase, including:
 - Participate in site meetings;
 - Respond to specific issues and concerns;
 - Provide support to commissioning and re-commissioning activities.
- e) Monitoring and Verification (M&V)
- Review or develop the M&V plan to ensure compliance with EPC requirements;
 - Assist with the development of measurement and verification (M&V) processes and activities and reports during the construction, "Proof of Savings", and performance period to verify the potential to achieve the contracted annual guaranteed cost savings;
 - Validation of energy savings reports, including: energy metering, savings calculations, and GHG reduction calculations;
 - Provide advice on M&V and reconciliation report for energy savings;
 - Provide advice and guidance to the client organization to review requests for adjustments to the baseline as proposed by the proponent or client organization.
- f) Information and Training
- Facilitate/provide training on EPC, energy management, M&V and/or assist with the development of training materials and/or guidelines for building operators, employees, and maintenance personnel.



3.2.2 Stream 1 - b) Renewable Energies and Innovative Technologies

The suite of services that a Facilitator could be asked to perform while facilitating a project and offering strategic advice on the breadth and scope on the installation of **renewable energies or innovative technologies** may include:

- Provide advice to client organizations in the integration of renewable energy or innovative technologies in their facilities.
- Help federal organizations determine objectives and needs with respect to renewable energy technologies and/or innovative technologies;
- Review existing building documentation and perform on-site assessments;
- Complete energy efficiency analysis;
 - o Complete a utility analysis
 - o Calculate the total generation potential
 - o Calculate potential electricity and natural gas energy savings;
 - o Calculate potential greenhouse gas savings
 - o Provide minimum and maximum recommended renewable energy installation capacity
 - o Provide the assumptions used to calculate the above;
- Complete structural feasibility and analysis;
 - o Verify that the building can structurally support any additional equipment loads;
 - o Meet current building code requirements;
- Complete mechanical and electrical feasibility and analysis;
 - o Analyse the technical feasibility of connecting to the building's electrical and/or mechanical infrastructure;
 - o Note necessary upgrades to electrical, mechanical and/or controls infrastructure for interconnection;
 - o At a schematic level, note interior or exterior space requirements for additional equipment and utility tie-in locations;
 - o Describe system redundancy capabilities;
 - o Note any maintenance or operational implications;
 - o Meet current building code requirements;
- Complete economic feasibility and financing analysis;
 - o Work with Vendors to provide realistic project costs including material and equipment costs, interconnection costs, demolition costs, regulatory costs, consulting cost, maintenance costs, etc.
 - o Provide estimated incentives, cost savings and feed-in tariffs;
- Determine any other implementation implications (i.e. regulatory, aesthetic, etc.)
- Estimate an appropriate schedule for implementation;
 - o Prepare a feasibility report summarizing the analysis, implications, advantages, disadvantages, available vendors / products and recommendations;
 - o Knowledge of sector (availability and readiness), make recommendations to client;
 - o Support in developing the procurement document for the REIT projects
 - o Develop and deliver presentations to clients and participate in events and meetings;
 - o Build an organization's understanding on the integration of renewable energy or innovative technologies in their facilities;
 - o advise and train the organization on the use of Clean energy decision-making software

3.2.3. Stream 2 - Policy Advice and Managerial Support Services

NRCan's Greening Government Technical Support Services is seeking proposals to provide ad hoc policy advice and managerial support services to the program, in the area of Energy Performance Contracting (EPC), Retrofits, and Renewable Energies and Innovative Technologies. The objective of policy advice and managerial support services is to assist in the transformation and modernization of the current program to focus on evolving energy matters as they affect buildings within the federal and related institutional sectors and to enhance the program's ability to provide client organizations with the necessary policy support to implement successful energy efficiency retrofit projects.

The required services may include, but are not limited to the following:



- Assisting the Department and the Federal Government in meeting its overall energy efficiency objectives through the preparation of policy documents and position papers in support of new program initiatives.
- Assisting with the drafting, amending or vetting of procurement instruments such as Requests for Supply Arrangement and Model Contracting Documents;
- Providing policy advice on Treasury Board contracting requirements and regulations respecting energy performance contracting and technical advice on the application of NRCan's Greening Government Technical Support Services and supportive/related policies;
- Providing project management assistance and managerial support to project authorities. This includes, but not limited to:
 - coordinating and preparing documentation, such as presentation decks, guidelines, and model contracting documents;
 - conducting research on energy performance contracting, renewable energy and innovative technologies and/or on buildings energy retrofits and preparing material, such as market research reports and market entry strategies ; and,
 - analysing material, such as policies and technical specifications, to explain its content.

NOTE: any work relating to solicitations and resulting contracts for both streams will be done in consultation with the procurement unit of the identified department as appropriate



APPENDIX “1” – PROJECT SUMMARY FORM

(Please fill-out one (1) Project Summary Form per project)

This project applies to which stream:

- Stream 1a – Energy Performance Contract
- Stream 1b – Renewable Energies and Innovative Technologies
- Stream 2 – Policy Advice and Managerial Support Services

1. Project Details

Client Organization:	
Address:	
Contact Person*:	
Project Timeframe	
From (mm/yy):	To (mm/yy):
Project Cost:	
Type of Building: (Institutional/Commercial)	Other:
Buiding(s) use:	
Surface Area:	
If applicable: (to be filled for evaluation purposes – see R3)	
Name of all resources in the team project	
Title and role of each resources	

*Note: this will serve for validation purposes only

2. Type of energy retrofit measures implemented

- | | |
|---|--|
| <input type="checkbox"/> lighting
<input type="checkbox"/> motors
<input type="checkbox"/> heating, ventilation and air conditioning
<input type="checkbox"/> renewable energy technologies
<input type="checkbox"/> employee awareness
<input type="checkbox"/> other energy retrofit measures (Please describe): _____ | <input type="checkbox"/> envelope improvements
<input type="checkbox"/> control systems
<input type="checkbox"/> fuel conversions
<input type="checkbox"/> cogeneration project |
|---|--|



3. Type of services provided

- Identified needs for energy efficiency retrofits
- Developed opportunity assessment
- Buy-in of senior management
- Project development and strategic advice
- Helped determine objectives and needs
- Develop a scope of work
- Review existing building documentation
- Identify, suggest and document improvements
- Develop recommissioning/ongoing commissioning reports
- Provide advice, develop project (installation of renewables or innovative technologies)
- Prepare implementation plan
- Train building operators/organizations
- Develop and deliver presentation
- Make recommendations to client
- Other types of services, please describe: _____

4. Description / Details of Project

Include a narrative summary describing the project above. The summary should provide the Project Authority with a better understanding of the role the Bidder played in the project. The summary should include the following:

- Overview of the project (maximum of one (1) paragraph);
- Description of each energy retrofit measures implemented as described in Section 2 (maximum of one (1) paragraph for each measure);
- Description of each type of service provided as described in Section 3 (maximum of one (1) paragraph for each type of services);
- Additional paragraphs, as required, to address how the Bidder guided the client through the EPC /REIT process, helped the client to identify key project measures, assisted the client to mitigate the risks, and provided any other services not specifically mentioned herein.

The summary must adhere to the following guidelines:

- 1 inch margins
- 8.5 x 11 paper size
- Times New Roman 12 font size
- Single line spacing

COMMENT: Your reply should not exceed 2,500 words in total; an ideal answer may require fewer words. NRCan reserves the right to disregard the latter part of any submission in excess of 2,500 words.



APPENDIX “2” – PROPOSED RESOURCES

NRCan requests that Bidders provide details of all proposed resources who will be working under this Arrangement. Prices will be determined at time of the individual RFP stage issued against this Arrangement.

<p>Bidder Firm Name:</p> <hr/> <hr/>
<p><u>Bidder Proposed SA Personnel:</u></p>
<p>Name: Title: Tel: E-mail: Primary: Yes No <i>(circle correct one)</i> Employee or Subcontractor:<i>(Specify)</i></p>
<p>Name: Title: Tel: E-mail: Primary: Yes No <i>(circle correct one)</i> Employee or Subcontractor: <i>(Specify)</i></p>
<p>Name: Title: Tel: E-mail: Alternate: Yes No <i>(circle correct one)</i> Employee or Subcontractor: <i>(Specify)</i></p>



ANNEX “B” – BASIS OF PAYMENT

To be established at time of each Request for Proposal, however, the rates to be provided with be an all-inclusive firm per diem rate that will include Travel and Living Expenses.



ANNEX "C" – SECURITY REQUIREMENT CHECKLIST

17-097

Ticket - 139787



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
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 Natural Resources Canada		2. Branch or Directorate / Direction générale ou Direction Office of Energy Efficiency / Buildings and Industry Division
3. a) Subcontract Number / Numéro du contrat de sous-traitance N/A	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant To be determined	
4. Brief Description of Work / Brève description du travail This procurement vehicle is for the delivery of various services required on an "as and when requested" basis by Natural Resources Canada, in support of the NRCan Greening Government Technical Support. This supply arrangement will provide a list of experts able to offer services, at any given time, in the following two (2) streams on an as needed basis. Stream 1: Energy Performance Contracting (EPC), Retrofits, and Renewable Energies and Innovative Technologies. Stream 2: Policy Advice and Managerial Support Services.		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
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? (Specify the level of access using the chart in Question 7. c) / (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> 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"/>
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"/>	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 checked="" 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"/>
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"/>
		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité





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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 :

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 / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / 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).

Security Classification / Classification de sécurité
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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	Signature
Telephone No. - N° de téléphone 343-292-6382	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel marielyne.tremblay@canada.ca	Date 3 June 2017

14. Organization Security Authority / Responsable de la sécurité de l'organisme

Name (print) - Nom (en lettres moulées) Julie MURPHY		Title - Titre Security Screening officer	Signature
Telephone No. - N° de téléphone 343-292-8088	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel Julie.murphy@canada.ca	Date 2017-6-16

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
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 June 15, 2017

17. Contracting Security Authority / Autorité contractante en matière de sécurité

Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

Monique Faucher
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Security Classification / Classification de sécurité
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