Public Works and Government Services Canada / Travaux publics et Services gouvernementaux Canada

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

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

# REQUEST FOR PROPOSAL
# DEMANDE DE PROPOSITION

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

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

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

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

**Comments - Commentaires**

**Vendor/Firm Name and Address**
**Raison sociale et adresse du fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

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

| | |
|---|---|
| **Title - Sujet**<br>POR - Quantitative | |
| **Solicitation No. - N° de l'invitation**<br>24062-180203/A | **Date**<br>2018-01-30 |
| **Client Reference No. - N° de référence du client**<br>24062-18-0203 | |
| **GETS Reference No. - N° de référence de SEAG**<br>PW-$$CY-021-74254 | |
| **File No. - N° de dossier**<br>cy021.24062-180203 | **CCC No./N° CCC - FMS No./N° VME** |
| **Solicitation Closes - L'invitation prend fin**<br>**at - à 02:00 PM**<br>**on - le 2018-03-02** | **Time Zone**<br>**Fuseau horaire**<br>Eastern Standard Time EST |
| **F.O.B. - F.A.B.**<br>**Plant-Usine:** ☐ **Destination:** ☑ **Other-Autre:** ☐ | |
| **Address Enquiries to: - Adresser toutes questions à:**<br>Amaral, Paola | **Buyer Id - Id de l'acheteur**<br>cy021 |
| **Telephone No. - N° de téléphone**<br>(613) 998-8588 ( ) | **FAX No. - N° de FAX**<br>( ) - |
| **Destination - of Goods, Services, and Construction:**<br>**Destination - des biens, services et construction:**<br>TREASURY BOARD OF CANADA, SECRETARIAT<br>Office of the Chief Human Recources<br>Officer<br>140 O'Connor Street, 11th Floor<br>OTTAWA<br>Ontario<br>K1A0R5<br>Canada | |

**Instructions: See Herein**

**Instructions: Voir aux présentes**

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

Canada

## TABLE OF CONTENTS

# PART 1 - GENERAL INFORMATION

## 1.1 Introduction

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

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

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

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

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

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, Security Requirements, the Security Requirements Checklist, the Electronic Payment Instruments, and the Federal Contractors Program for Employment Equity - Certification, and any other annexes.

## 1.2 Summary

Public Works and Government Services Canada (PWGSC), on behalf of the Treasury Board of Canada Secretariat (TBS), has a requirement for the services of a public opinion research firm to conduct the Public Service Employee Survey (PSES). The PSES will provide information to support the continuous improvement of people management practices in the federal public service.

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) website.

The requirement is subject to the provisions of the Canadian Free Trade Agreement (CFTA).

The requirement is limited to Canadian goods and/or services.

The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity - Certification.

This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation for bid submission. Bidders must refer to Part 2 of the bid solicitation entitled Instructions to bidders for further information.

The Phased Bid Compliance Process (PBCP) applies to this requirement.

### 1.3 Debriefings

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

# PART 2 -
# BIDDER INSTRUCTIONS

## 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.
Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2017-04-27) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

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

Delete: 60 days
Insert: 120 days

The 2003 standard instructions is amended as follows:

- Section 5, entitled Submission of bids, is amended as follows:
  - subsection 1 is deleted entirely and replaced with the following: "Canada requires that each bid, at solicitation closing date and time or upon request from the Contracting Authority, for example in the case of epost Connect service, be signed by the Bidder or by an authorized representative of the Bidder. If a bid is submitted by a joint venture, it must be in accordance with the section entitled Joint venture."
  - subsection 2.d is deleted entirely and replaced with the following: "send its bid only to the specified Bid Receiving Unit of Public Works and Government Services Canada (PWGSC) identified in the bid solicitation, or to the address specified in the bid solicitation, as applicable;"
  - subsection 2.e is deleted entirely and replaced with the following: "ensure that the Bidder's name, return address and procurement business number, bid solicitation number, and solicitation closing date and time are clearly visible on the bid; and,"
- Section 6, entitled Late bids, is deleted entirely and replaced with the following: "PWGSC will return bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in the section entitled Delayed bids. For bids submitted using means other than the Canada Post Corporation's epost Connect service, the bid will be returned. For bids submitted using Canada Post Corporation's epost Connect service, conversations initiated by the Bid Receiving Unit via the epost Connect service that contain access, records and information pertaining to a late bid will be deleted."
- Section 07, entitled Delayed bids, is amended as follows:
  - Subsection 1 is amended to add the following piece of evidence: "d. a CPC epost Connect service date and time record indicated in the epost Connect conversation activity."
- Section 8, entitled Transmission by facsimile, is deleted and replaced by the following:
  "Transmission by facsimile or by epost Connect
  1. Facsimile
     a. Unless specified otherwise in the bid solicitation, bids may be submitted by facsimile. The only acceptable facsimile number for responses to bid solicitations issued by PWGSC headquarters is 819-997-9776 or, if applicable, the facsimile number identified in the bid solicitation. The facsimile number for responses to bid solicitations issued by PWGSC regional offices is identified in the bid solicitation.

b. For bids transmitted by facsimile, Canada will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
   i. receipt of garbled or incomplete bid;
   ii. availability or condition of the receiving facsimile equipment;
   iii. incompatibility between the sending and receiving equipment;
   iv. delay in transmission or receipt of the bid;
   v. failure of the Bidder to properly identify the bid;
   vi. illegibility of the bid; or
   vii. security of bid data.

c. A bid transmitted by facsimile constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids.

2. ePost Connect

a. Unless specified otherwise in the bid solicitation, bids may be submitted by using the epost Connect service provided by Canada Post Corporation (https://www.canadapost.ca/web/en/products/details.page?article=epost_connect_send_a).

b. To submit a bid using epost Connect service, the Bidder must either:
   i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
   ii. send as early as possible, and in any case, at least six business days prior to the solicitation closing date and time, an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.

c. If the Bidder is sending an email to the Bid Receiving Unit, the Bid Receiving Unit will then initiate an epost Connect conversation which will allow the Bidder to transmit its bid afterward at any time prior to the solicitation closing date and time. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access the message within the conversation, and the Bidder can reply to the email notification by transmitting its bid.

d. If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after solicitation closing date and time.

e. The email address of PWGSC Bid Receiving Unit in Headquarters is: TPSGC.DGAreceptiondessoumissions-ABBidReceiving.PWGSC@tpsgc-pwgsc.gc.ca. The solicitation number must be identified in the epost Connect message field of all electronic transfers.

f. It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian address, they may use the Bid Receiving Unit address specified on page 1 of the solicitation in order to register for the epost Connect service.

g. For bids transmitted by epost Connect service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
   i. receipt of a garbled or incomplete bid;
   ii. availability or condition of the epost Connect service;
   iii. incompatibility between the sending and receiving equipment;
   iv. delay in transmission or receipt of the bid;
   v. failure of the Bidder to properly identify the bid;
   vi. illegibility of the bid;
   vii. security of bid data; or
   viii. inability to create an electronic conversation through the epost Connect service.

h. A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with the section entitled Submission of bids."

### 2.1.1 *SACC* Manual Clauses

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

## 2.2 Submission of Bids

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

## 2.3 Former Public Servant

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

**Definitions**

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

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

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

"pension" means a pension or annual allowance paid under the *Public Service Superannuation Act* (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the *Supplementary Retirement Benefits Act*, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the *Canadian Forces Superannuation Act*, R.S., 1985, c. C-17, the *Defence Services Pension Continuation Act*, 1970, c. D-3, the *Royal Canadian Mounted Police Pension Continuation Act* , 1970, c. R-10, and the *Royal Canadian Mounted Police Superannuation Act*, R.S., 1985, c. R-11, the *Members of Parliament Retiring Allowances Act*, R.S. 1985, c. M-5, and that portion of pension payable to the *Canada Pension Plan Act*, R.S., 1985, c. C-8.

**Former Public Servant in Receipt of a Pension**

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes** ( ) **No** ( )

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

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

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

**Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

## 2.4 Enquiries - Bid Solicitation

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

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

## 2.5 Applicable Laws

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

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

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

The Treasury Board of Canada Secretariat has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the *Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts*: the main purpose of the Contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

# PART 3 -
# BID PREPARATION INSTRUCTIONS

## 3.1 Bid Preparation Instructions

If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 8 of the 2003 standard instructions and as amended in Part 2 - Bidder Instructions, Article 2.1 Standard Instructions, Clauses and Conditions. Bidders are required to provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid
Section II: Financial Bid
Section III: Certifications
Section IV: Additional Information

If the Bidder is simultaneously providing a hard copy of the bid using another acceptable delivery method, and if there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the soft copy will have priority over the wording of the hard copy.

If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid (five (5) hard copies and one (1) soft copy on a CD or a USB key)

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

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

Section IV: Additional Information (one (1) hard copy)

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

Canada requests that bidders follow the format instructions described below in the preparation of hard copy of their bid:

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

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

1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and

2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

**Section I: Technical Bid**

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

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

**Section II: Financial Bid**

**3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B".

**3.1.2 Electronic Payment of Invoices – Bid**

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex "E" Electronic Payment Instruments, to identify which ones are accepted.

If Annex "E" Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

**Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.

**Section IV: Additional Information**

**3.1.3 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures**

**3.1.3.1** As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder'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*

**3.1.3.2** The Company Security Officer must ensure through the Contract Security Program that the Bidder and proposed individuals hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.

**3.1.3.3** In addition, Bidders are requested to complete and submit the forms found in Annex "I" RFP Submission Form / Subcontractor Information.

# PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

## 4.1 Evaluation Procedures

(a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

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

(c) Canada will use the Phased Bid Compliance Process described below.

### 4.1.1 Phased Bid Compliance Process

#### 4.1.1.1 General

(a) Canada is conducting the Phased Bid Compliance Process described below for this requirement.

(b) Notwithstanding any review by Canada at Phase I or II of the PBCP, Bidders are and will remain solely responsible for the accuracy, consistency and completeness of their Bids and Canada does not undertake, by reason of this review, any obligations or responsibility for identifying any or all errors or omissions in Bids or in responses by a Bidder to any communication from Canada.

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE

IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.

THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A COMPLIANCE ASSESSMENT REPORT (CAR) (EACH DEFINED BELOW) IN PHASE I OR II MAY NOT BE SUCCESSFUL IN RENDERING ITS BID RESPONSIVE TO THE MANDATORY REQUIREMENTS THAT ARE THE SUBJECT OF THE NOTICE OR CAR, AND MAY RENDER ITS BID NON-RESPONSIVE TO OTHER MANDATORY REQUIREMENTS.

(c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.

(d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2017-04-27) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

(e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

**4.1.1.2 Phase I: Financial Bid**

(a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.

(b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services Canada.

(c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.

(d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.

(e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.

(f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.

(g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.

(h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

(i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

**4.1.1.3 Phase II: Technical Bid**

(a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.

(b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.

(c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.

(d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

(e) The Bidder’s response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder’s Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder’s own risk. All submitted information must comply with the requirements of this solicitation.

(f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.

(g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion**,** and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder’s original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.

(h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.

(i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

**4.1.1.4 Phase III: Final Evaluation of the Bid**

(a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.

(b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

**4.1.2 Technical Evaluation**

**4.1.2.1 Mandatory Technical Criteria**

The Phased Bid Compliance Process will apply to all mandatory technical criteria included in Annex “C”.

#### 4.1.2.2 Point Rated Technical Criteria

Bids will be evaluated against the point rated technical criteria included in Annex “C”, using the evaluation factors and weighting indicators specified for each criterion. Bids not meeting the identified minimum point requirements will be deemed non-responsive.

### 4.1.3 Financial Evaluation

Financial evaluation is fully described in Annex “B3”.

## 4.2 Basis of Selection

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

1. To be declared responsive, a bid must:

    a. comply with all the requirements of the bid solicitation; and

    b. meet all mandatory criteria; and

    c. obtain the required minimum points specified for each criterion for the technical evaluation, and

    d. obtain the required minimum of **570** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **950** points.

2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.

3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **60%** for the technical merit and **40%** for the price.

4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **60%**.

5. To establish the pricing score, each firm price or rate will be prorated against the lowest firm price or rate for each individual category of service. The ratio of **40%** will be divided against the five (5) main category services as follows:

    30/40 - Bid Evaluation Value (BEV)
    2/40 - Option 1: Average Firm Unit Price for Additional Surveys
    4/40 - Option 2: Average Firm Unit Price for 5 Additional Supplemental Questions
    4/40 - Option 3: Average Firm Unit Price for 10 Additional Supplemental Questions

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

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

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

| | | Bidder A | Bidder B | Bidder C | Bidder D |
|---|---|---|---|---|---|
| **Overall Technical Score** | | 115/135 | 89/135 | 107/135 | 92/135 |
| **Average Bid Evaluation Price** | | $55,000.00 | $64,298.00 | $69,996.87 | $71,409.33 |
| **Calculations** | **Technical Merit Score** | 115/135 x 60 = 51.111 | 89/135 x 60 = 39.556 | 107/135 x 60 = 47.556 | 92/135 x 60 = 40.889 |
| | **Total Weighted Financial Score** | 38.232 | 34.139 | 29.957 | 30.717 |
| **Combined Rating** | | 89.343 | 73.695 | 77.513 | 71.606 |
| **Overall Rating** | | 1st | 3rd | 2nd | 4th |

8. In the event that a bidder is awarded the contract and does not meet the Proof of Concept requirements, as described in subsection 9.03 of the Statement of Work, Canada reserves the right to terminate the contract and award a new contract to the next highest-ranked compliant bidder under the same terms and conditions.

# PART 5 - CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

## 5.1 Certifications Required with the Bid

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

### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the Forms for the Integrity Regime website (http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html), to be given further consideration in the procurement process.

## 5.2 Certifications Precedent to Contract Award and Additional Information

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

### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real procurement agreement of the Ineligibility and Suspension Policy *(*http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html)*,* the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the Employment and Social Development Canada (ESDC) - Labour's website (https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#).

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

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

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

### 5.2.3 Additional Certifications Precedent to Contract Award

#### 5.2.3.1 Canadian Content Certification

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

This procurement is limited to Canadian goods.

The Bidder certifies that:

(    ) the good(s) offered are Canadian goods as defined in paragraph 1 of clause A3050T.

______________________________ _______________________
Signature Date

#### 5.2.3.2 Status and Availability of Resources

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

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

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

______________________________ _______________________
Signature Date

**5.2.3.3 Education and Experience**

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

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

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

____________________________ ______________________
Signature Date

**5.2.3.4 Bilingual Capabilities**

The Bidder certifies that the proposed project team has the ability to conduct research in both official languages.

____________________________ ______________________
Signature Date

**5.2.3.5 Market Research Standards**

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

____________________________ ______________________
Signature Date

## PART 6 – SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirements

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

   (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;

   (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;

   (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

   (d) the Bidder’s proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;

   (e) the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.

2. For additional information on security requirements, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) website.

# PART 7 - RESULTING CONTRACT CLAUSES

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

| THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT |
| --- |

**POR # 089-17**

## 7.1 Statement of Work

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

### 7.1.1 Optional Goods and/or Services

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at Annex “A” of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

## 7.2 Standard Clauses and Conditions

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

### 7.2.1 General Conditions

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

### 7.2.2 Supplemental General Conditions

The following apply to and form part of the Contract:

*SACC Manual* clause 4007 (2010-08-16) - Canada to Own Intellectual Property Rights in Foreground Information
*SACC Manual* clause 4008 (2008-12-12) – Personal Information
*SACC Manual* clause A9122C (2008-05-12) – Protection and security of data stored in databases

## 7.3 Security Requirements

**7.3.1** The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract:

7.3.1.1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (CISD), **Public Works and Government Services Canada (PWGSC**).

7.3.1.2. 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.

7.3.1.3. 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 B.

7.3.1.4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.

7.3.1.5. The Contractor/Offeror must comply with the provisions of the:

a) Security Requirements Check List and security guide (if applicable), attached at Annex "D";
b) Industrial Security Manual (Latest Edition).

### 7.3.2 Contractor's Sites or Premises Requiring Safeguarding Measures

**7.3.2.1** Where safeguarding measures are required in the performance of the Work, the Contractor must diligently maintain up-to-date the information related to the Contractor'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*

**7.3.2.2** The Company Security Officer must ensure through the Contract Security Program that the Contractor and individuals hold a valid security clearance at the required level.

## 7.4 Term of Contract

### 7.4.1 Period of the Contract

The period of the Contract is from date of contract award to **March 31, 2019**, inclusive.

### 7.4.2 Option to Extend the Contract

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

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

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

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

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

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

### 7.5.2 Project Authority

The Project Authority for the Contract is:

Name: ____________________
Title: ____________________
Organization: ____________________
Address: ____________________

Telephone: ___-___-_____
Facsimile: ___-___-_____
E-mail address: _____________

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

### 7.5.3 Contractor's Representative

Name: ____________________
Title: ____________________
Organization: ____________________
Address: ____________________

Telephone: ___-___-_____
Facsimile: ___-___-_____
E-mail address: _____________

### 7.6 Proactive Disclosure of Contracts with Former Public Servants

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

### 7.7 Payment

#### 7.7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the firm lot prices as specified in Annex "B", for a total cost of $ __________ *insert the amount at contract award*). Customs duties are included and Applicable Taxes are extra.

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

#### 7.7.2 Limitation of Price

*SACC Manual* clause C6000C (2017-08-17) Limitation of Price

#### 7.7.3 Schedule of Milestones

| Milestone | Deliverables (approved by Project Authority) | Firm Amount | Due Date or "Delivery Date" |
|---|---|---|---|
| 1 | Planning and testing (all Milestone 1 items) | ___ | In accordance with Section 11 of the SOW |
| 2 | Fielding (all Milestone 2 items) | ___ | In accordance with Section 11 of the SOW |
| 3 | Datasets and reports (all Milestone 3 items) | ___ | In accordance with Section 11 of the SOW |

#### 7.7.5 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using the following Electronic Payment Instrument(s):

a. Direct Deposit (Domestic and International);

### 7.8 Identification of the Fieldwork Sub-Contractor

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

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

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

The sub-contractor is:

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

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

## 7.9 Invoicing Instructions

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

   Each invoice must be supported by:

   a. a copy of the release document and any other documents as specified in the Contract;

   b. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;

   c. a copy of the monthly progress report.

2. Invoices must be distributed as follows:

   a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

   b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 7.10 Certifications and Additional Information

### 7.10.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

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

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

### 7.10.3 *SACC Manual* Clauses

*SACC Manual* clause A3060C (2008-05-12) Canadian Content Certification
*SACC Manual* clause A3015C (2014-06-26) Certifications - Contract

## 7.11 Applicable Laws

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

## 7.12 Priority of Documents

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

(a) the Articles of Agreement;
(b) the supplemental general conditions 4008 (2008-12-12) – Personal Information;
(c) the general conditions 2035 (2016-04-04) – General Conditions - Higher Complexity - Services;
(d) Annex “A”, Statement of Work;
(e) Annex “B”, Basis of Payment;
(f) Annex “C”, Security Requirements Check List;
(g) the Contractor's bid dated ______.

## 7.13 Political Neutrality Certification

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

## 7.14 Protection and Security of Data Stored in Database

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:

    a. equivalent protections are given to personal information as in Canada under legislation such as the *Privacy Act*, R.S. 1985, c.P-21, and the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and

    b. the laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

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

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).

3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in an another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.

4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.

5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.

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

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

## PART I – INTERPRETATION

### 1. DEFINITIONS

Unless the context clearly requires otherwise, the capitalized terms used in the SOW shall have the definitions assigned to them in the Contract or in this Section. These definitions shall apply equally to both the singular and plural forms of the terms defined, and words of any gender shall include each other gender when appropriate.

| | |
|---|---|
| CSV | Comma-separated values |
| IT | Information Technology |
| MRIA | Marketing Research and Intelligence Association |
| PSES | Public Service Employee Survey |
| SOW | Statement of Work |
| WCAG | Web Content Accessibility Guidelines |

## PART II – OVERVIEW

### 2. INTRODUCTION

2.01. Canada requires a public opinion research firm to conduct the Public Service Employee Survey (PSES).

### 3. PROJECT BACKGROUND

3.01. Every three years since 1999, the Treasury Board of Canada Secretariat (TBS) has conducted the PSES to provide information to support the continuous improvement of people management practices in the federal public service.

3.02. The PSES has historically been administered by Statistics Canada.

3.03. The PSES provides federal departments and agencies with ongoing evidence on key people management issues, and allows them to address these issues in a timely manner.

3.04. Topics covered by the survey relate to Treasury Board policies and government priorities, such as harassment and discrimination, performance management, leadership competencies, respectful and ethical practices, workplace well-being, official language use, duty to accommodate and labour relations.

3.05. It is a recognized leading practice to conduct regular employee surveys to have reliable information for decision-making. International governments, such as those of the United States, United Kingdom and Australia, conduct annual employee surveys; Canadian provincial and territorial governments run their employee surveys every year or two years.

3.06. As outlined in Budget 2016, the Government of Canada is committed to ensuring that ongoing workplace improvement is founded on decision-making based on evidence, such as that gathered through employee surveys.

3.07. As a result, starting in 2018, The Government of Canada will conduct the PSES on an annual basis, at approximately the same time each year (i.e., August and September). The next PSES is scheduled to launch in August 2018.

## 4. OBJECTIVE

4.01. The objective of the PSES is to provide information to support the continuous improvement of people management practices in the federal public service. Better people management practices lead to better results for the public service, and in turn, better results for Canadians.

4.02. The survey results allow federal departments and agencies to identify their areas of strength and concern related to people management practices, to benchmark and track their progress over time, and to inform the development and refinement of their action plans. The impacts of these actions are then assessed through the next PSES.

4.03. The survey results also allow policy centres to monitor issues and track progress over time.

## PART III – SCOPE OF WORK

## 5. SERVICES

5.01. Within the timeframes outlined in Section11, the Contractor must conduct the PSES in accordance with the requirements and constraints specified in Part III, Part IV and Part V, as applicable.

## 6. TARGET POPULATION

6.01. The target population is all active Government of Canada employees of departments and agencies in the core public administration and of participating separate agencies listed in Schedules I, IV and V of the Financial Administration Act (approximately 270,000 employees in approximately 90 departments/agencies). The target population includes indeterminate, term, seasonal, casual and student employees, as well as Governor in Council appointees. Minister's exempt staff, contracted individuals and employees on leave without pay are not included. A full list of eligible employees and email addresses will be provided to the Contractor by the Project Authority.

## 7. DATA COLLECTION

7.01. The Contractor must conduct the PSES as a voluntary census, based on the list provided by the Project Authority. No sampling is required.

7.02. This estimated response rate is between 50% and 70%. This estimate is based on the response rates obtained for previous public service-wide employee surveys.

7.03. The Contractor must:

a) Conduct the PSES using questions provided by the Project Authority.
b) Perform primary data collection via an accessible online questionnaire (as specified in section 9.05, made available in English and French.
c) Provide alternate data collection methods, including:
    i. A paper questionnaire for employees who do not have an email address or access to the internet, for departments or agencies that request such an option; and;

ii. An option for a telephone interview in either official language.

d) Perform any necessary data-entry for the paper and telephone questionnaire responses.

e) Provide all necessary field and tabulation services.

7.04. It is anticipated that the 2018 PSES will contain up to 145 text questions. This number takes into account sub-questions, but excludes departmental supplemental questions specified in Options 2 and 3, Part IV. The 2018 survey will repeat a majority of the questions asked in the 2017 PSES questionnaire.

7.05. The PSES is expected to:

a) Take an average of 20 minutes to complete; and

b) Require electronic data collection to run for a period of six weeks starting on the third Monday of August.

7.06. The Project Authority will provide the Contractor with a complete list of employees, including their email address and other related information (e.g., department name, organizational sub-unit, occupational group and level). The Contractor must send each employee an email invitation containing a link with an embedded unique access code to access the survey. Unique access codes are intended to prevent employees from answering the survey multiple times, ensure that response rates are accurate, and allow for non-response weighting adjustments.

7.07. The Contractor must send email invitations over five consecutive business days to avoid server overload. The Contractor must send reminders on a bi-weekly basis to employees who have not yet responded to the survey (up to a maximum of three reminders).

7.08. During the course of the survey, the Contractor must provide regular reports of bounce-back emails to the Project Authority. Following the receipt of the bounce-back report, the Project Authority must have an opportunity to correct erroneous email addresses, delete employees who have left the organization, or add new employees. The Contractor must adjust the sample frame on a weekly basis according to specifications provided by the Project Authority, and send email invitations to employees who have been added to the sample frame, or whose email addresses have been modified.

7.09. Employees who have not received an invitation must also have the opportunity to call the help line or email the mailbox provided by the Contractor to request a survey email invitation or a telephone interview. Telephone interviews in either official language must be made available upon request. It is estimated that approximately 50 telephone interviews will be required.

7.10. Employees who do not have an email address or access to the Internet may also request a paper questionnaire to complete. The Contractor must format, print and distribute the paper questionnaires to departments, who in turn will distribute them within their department. The Contractor must print paper questionnaires in booklet format, with English and French versions back-to-back. Approximately 7,000 paper questionnaires are expected to be required for the 2018 survey, and a 15% to 20% return rate is expected for paper questionnaires.

7.11. Once completed, the paper questionnaire must be returnable directly to the Contractor in a postage-paid return envelope provided by the Contractor. Completed paper questionnaires must be accepted for up to 30 days following the established survey period.

## 8. OPTIONAL SERVICES

8.01. The Contractor must perform optional services if requested by the Project Authority, as further described in Part IV.

8.02. It should be noted that:

a) Option 1 can be selected individually or in conjunction with Option 2 or Option 3.

b) Option 2 and Option 3 are mutually exclusive.

c) Unless otherwise specified, the Contractor must perform optional services in accordance with the set timelines specified in section 11.

## 9. TASKS

### 9.01. General Project Management

9.01.01. The Contractor must:

a) Register the survey with MRIA’s Research Registration System.

b) Identify the individual(s) who will have supervising authority and accountability for the project to the Project Authority.

c) Provide client liaison in either official language to the Project Authority.

### 9.02. Quality Assurance

9.02.01. The Contractor must validate and edit all deliverables (in French and English) before they are sent to the Project Authority (this includes all reports, memos, and datasets). The Contractor’s assigned senior researcher for the project must perform final validation.

### 9.03. Proof of Concept

9.03.01. Within one week of signing the contract, the Contractor must provide a Proof of Concept consisting of a prototype for the Web questionnaire using the sample survey questions provided in Appendix 1 to Annex “A”.

9.03.02. The Contractor must ensure that the prototype for the Web questionnaire conforms to or exceeds the specifications outlined in section 17.02.01.

9.03.03. Notably, the Contractor must ensure that the prototype for the Web questionnaire conforms to the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request), level AA or higher. Subject-matter experts representing Canada will assess the prototype for non-conformance issues. If Canada determines that the prototype for the Web questionnaire fails to conform to the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request), level AA or higher, Canada may terminate the contract or, depending on the nature of the non-conformance issues, Canada may provide the Contractor up to five business days to correct any non-conformance issues. Where the Contractor’s prototype fails to conform to the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request), level AA or higher, after an opportunity to correct identified non-conformance issues, Canada may exercise its rights to terminate the Contract and have the work performed by another Contractor.

9.04. **Weekly Status Report**

9.04.01. The Contractor must e-mail weekly status reports to the Project Authority to summarize progress to date, issues, mitigating strategies or proposed solutions, and next steps.

9.05. **Online Questionnaire**

9.05.01. It is anticipated that the 2018 PSES will contain up to 145 text questions (no audio or video). This number takes into account sub-questions (e.g. Q22a, Q22b, Q22c), but excludes departmental supplemental questions specified in Options 2 and 3, Part IV. A majority of questions are asked on a five-point rating scale (in addition to “Don’t know” and “Not applicable” response options). Approximately 10 questions have “select all that apply” response options, for a total of 104 response options. Two questions involve a “please specify” option, consisting of a text box with a maximum of 150 characters. The questionnaire also contains drop-down menus and a number of skip questions. All questions are voluntary. The 2018 survey will repeat a majority of the questions asked in the 2017 PSES questionnaire.

9.05.02. Program English and French versions of the Web questionnaire according to specifications provided by the Project Authority.

**Project Authority responsibility:** Provide specifications for programming the questionnaire.

9.05.03. Employees’ department/agency must be pre-populated and pre-assigned in the online questionnaire based on the information contained in the list of employees provided by the Project Authority:

a) Respondents must be prompted to confirm their department or agency. In the event that they do not work for this department or agency, respondents must be asked to select their department or agency from a drop-down menu.

**Project Authority responsibility:** Provide the Contractor the list of employees containing their full name, email address, department/agency, organizational sub-unit (second-level) and occupational group and level.

b) For departments/agencies with 150 or more employees, there will be up to four additional levels of organizational sub-units. Respondents must be asked to select their organizational sub-units from a series of drop-down menus.

**Project Authority responsibility:** Provide the Contractor the full list of organizational sub-units by department/agency.

9.05.04. When specified by the Project Authority, lists must be in alphabetical order in both English and French versions of the electronic and paper questionnaire (e.g., occupational group list, department/agency list)

9.05.05. The Web questionnaire must allow respondents to toggle between the English and French versions of the questionnaire, at any point in the survey.

9.05.06. The Web questionnaire must feature a progress status bar that accurately reflects respondents’ relative position in the survey, from 0% to 100%.

9.05.07. The Contractor must ensure that the Web questionnaire conforms to or exceeds the specifications outlined in 17.02.01.

9.05.08. The Contractor must:

a) Test the English and French versions of the online questionnaire to ensure it meets Project Authority’s specifications (e.g., skip logic, ability to toggle between English and French, character limits, progress bar, other specifications). Ensure English and French questions reflect what has been provided by the Project Authority (no typos).

b) Test the online questionnaire for accessibility against WCAG 2.0 (or latest version at time of work request), and ensure it conforms to success criteria AA or higher. Address any conformance issues.

c) Provide the Project Authority with an evaluation of accessibility of the online questionnaire showing conformance with WCAG 2.0 (or latest version at time of work request), success criteria AA or higher; address any conformance issues identified.

d) Test the online questionnaire to ensure it is optimized for and easy to use with mobile devices (including Blackberry 10), as per the Standard on Optimizing Websites and Applications for Mobile Devices; address any usability issues.

e) Provide the Project Authority with an evaluation of usability of the online questionnaire on mobile devices, and address any usability issues.

f) Following any revisions, conduct testing of the online questionnaire. Provide test links to the Project Authority. Address any issues raised by the Project Authority.

9.05.09. The Contractor must liaise with IT representatives in each participating department or agency and conduct IT testing to identify technical issues or limitations, to ensure network capacity, etc. The Contractor must be able to liaise with departments or agencies and conduct IT testing in both official languages. The contractor must resolve any outstanding IT issues and inform the Project Authority of any issues identified through IT testing with departments/agencies.

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| **Project Authority responsibility:** Provide contact information for IT representatives. |

9.05.10. The Contractor must provide test links of the online questionnaire to the Project Authority and resolve any issues identified by the Project Authority.

9.06. **Paper Questionnaire**

9.06.01. It is anticipated that approximately 7,000 paper questionnaires will be required. A 15% to 20% return rate is expected for paper questionnaires (approximately between 1050 and 1400 returned paper questionnaires).

9.06.02. The paper version of the survey must be anonymous; that is, the respondent's name or other identification must not be required on the questionnaire.

9.06.03. Paper questionnaires must be printed in booklet format according to Project Authority's specifications, with English and French versions back-to-back.

9.06.04. For departments/agencies with 150 or more employees, there will be up to four additional levels of organizational sub-units. Respondents will be asked to identify their organizational sub-units with the help of a paper insert containing the list of organizational sub-units codes for their department/agency. For an example of the number of organizational units per department or agency, please see columns A to E in **https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-organization.csv**

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| **Project Authority responsibility:** Provide the full list of organizational sub-units by department/agency. |

9.06.05. The Contractor must:

a) Format, review and print proof of paper questionnaire

b) Provide Project Authority with 20 copies of the physical proof of the paper questionnaire for review and approval.

c) Following any revisions, print final proof of paper questionnaire and send to Project Authority for approval.

d) Format, review and print proof of paper inserts for each department or agency containing their organizational sub-unit codes (for respondents' reference when identifying their organizational unit), with French and English, back to back. Send physical proof of paper inserts to Project Authority for approval.

| **Project Authority responsibility**: Provide example of paper insert. |
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e) Following any revisions, print final proof of paper inserts containing organizational sub-unit codes and send to Project Authority for approval.

f) Print required number of copies of the paper questionnaire in booklet format, with English and French versions back to back.

g) Print required number of paper inserts containing organizational sub-unit codes. Enclose appropriate paper insert into middle of questionnaire booklets destined for a specified department.

h) Prepare required number of postage-paid addressed envelopes for employees to submit paper questionnaires. Staple postage-paid envelopes into middle of questionnaire booklets.

| **Project Authority responsibility**: Provide required number of paper questionnaires per department/agency. |
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9.06.06. The Contractor must send the requested number of paper questionnaires, including appropriate paper inserts and pre-paid postage envelopes, to individual departments/agencies. It is estimated that approximately 60 departments/agencies will request paper questionnaires. A few larger departments/agencies may require that questionnaires be sent to multiple shipping points, for a total of approximately 60 to 80 different shipping points. Departments/agencies will distribute the paper questionnaires to employees within their own organizations

| **Project Authority responsibility**: Provide contact names and delivery addresses. |
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9.06.07. The Contractor must accept completed paper questionnaires for up to 30 days following the established survey period.

9.06.08. The Contractor must conduct data entry for returned paper questionnaires.

9.07. **Telephone Questionnaire:**

9.07.01. Employees may contact the Contractor via the generic email address or the telephone help line to request a telephone interview.

9.07.02. The Contractor must:

a) Conduct testing of the telephone survey.

b) Conduct one pre-test in English and one test in French with the Project Authority.

c) Correct any issues.

9.07.03. It is estimated that approximately 50 telephone interviews will be required.

9.07.04. The Contractor must conduct data entry for telephone interviews.

9.08. **Email Support**

9.08.01. The Contractor must create an email account with a bilingual address (e.g., pses-saff@name of Contractor) dedicated to the PSES to allow employees to request to complete the survey, ask questions about the Web survey, and report issues.

9.08.02. The Contractor must respond to employee questions and issues via email within two business days, in the official language of choice of the employee.

9.08.03. Direct all questions related to the content, purpose and confidentiality of the survey to the Project Authority's generic email address.

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| **Project Authority responsibility:** Provide the Contractor with its generic mailbox address. Answer all questions related to the content and purpose of the survey. |

9.08.04. The Contractor must:

a) Ensure that employees who are requesting to complete the survey are admissible to participate by administering a screening questionnaire to be approved by the Project Authority (only indeterminate, term, seasonal, casual and student employees, as well as Governor in Council appointees are included in the survey).

b) Ensure that employees are not already in the sample frame by asking the employee's name, department, email address and occupational group and level:

i. If the employee is in the sample, the Contractor must reissue the original email invitation to the correct email address and the information corrected in the sample frame.

ii. If the employee is not in the sample frame, the Contractor must collect information on the employee such as department, name, occupational group and level, add this information to the sample frame and send them an invitation email containing a link to survey (with embedded unique access code) or conduct a telephone interview (if requested).

9.09. **Telephone Support**

9.09.01. The Contractor must set up a telephone help-line dedicated to the PSES to allow employees to request to complete the survey, ask questions, and report issues, and for employees who wish to conduct the survey via a telephone interview with a live agent:

a) The help line must be available Monday to Friday except for statutory holidays, from 8am to 9pm Eastern Time (to allow coverage during working hours across Canada) for the duration of the survey.

b) The Contractor must provide services in the official language of choice of the employee, with a high degree of fluency.

c) The Contractor must conduct data entry for telephone interviews.

9.09.02. The Contractor must:

a) Ensure that employees who are requesting to complete the survey are admissible to participate by administering a screening questionnaire to be approved by the Project Authority (only indeterminate, term, seasonal, casual and student employees, as well as Governor in Council appointees are included in the survey).

b) Ensure that employees are not already in the sample frame by asking the employee's name, department, email address and occupational group and level:

i. If the employee is in the sample, the Contractor must reissue the original email invitation to the correct email address and the information corrected in the sample frame.

ii. If the employee is not in the sample frame, the Contractor must collect information on the employee such as department, name, occupational group and level, add this information to the sample frame and send them an invitation email containing a link to survey (with embedded unique access code) or conduct a telephone interview (if requested).

9.10. **Fielding**

9.10.01. The Contractor must create a tag (variable) in the dataset to identify respondents who have answered the survey via the online questionnaire, paper questionnaire or telephone interview.

9.10.02. At the Project Authority's option, up to five (5) business days before the official launch of the survey, the Contractor must prepare and send invitation emails containing confidential links to the survey (with a unique access code embedded into the link) to eligible employees in up to three (3) departments/agencies as specified by the Project Authority. This "soft launch" will allow the identification of issues that may have been missed during testing and the resolution of these issues before the official survey launch.

a) The Contractor must report any issues identified during the soft-launch to the Project Authority and address them prior to the official launch.

9.10.03. Beginning on the survey launch date, the Contractor must prepare and send invitation emails containing confidential links to the survey (with embedded unique access code) to other eligible employees. The Contractor must stagger email invitations over a maximum of five consecutive weekdays to avoid server overload issues. To the extent possible, all eligible employees within an individual department/agency should receive their invitation email on the same day.

9.10.04. At the Project Authority's request, the Contractor must provide a list of confidential links with embedded unique access codes for departments/agencies that cannot share their employee list.

**Project Authority responsibility:** Provide the number of required confidential links. The Project Authority will share these links with the department/agency in question, who in turn, will send these links to their employees.

9.10.05. At the Project Authority's request, the Contractor must provide a generic link to the survey without a unique access code for departments/agencies that do not provide their employees with a work email account.

**Project Authority responsibility:** Share these generic links with departments/agencies in question. Departments/agencies will then be responsible for sending the email invitation containing the generic survey link to their employees.

9.10.06. It is expected that approximately 4% of email addresses provided will be invalid and will bounce back. The Contractor must resend all bounce-back emails at least once to ensure they are in fact invalid, and not bouncing back because of other IT reasons (e.g., server busy).

9.10.07. During the collection period, the Contractor must provide a weekly report containing:

a) The list of employees who have contacted the Contractor directly and requested to complete the survey by email or telephone (additions to the sample frame).

b) The list of bounce-back email addresses.

9.10.08. The weekly report should be sorted by department/agency, and contain all related information about the employee, including their name, email address, department or agency, occupational group and level and second level organizational sub-unit (if applicable).

9.10.09. The Contractor must provide the Project Authority with opportunities to:

a) Correct erroneous email addresses.

b) Remove employees from the sample frame (e.g., employees who have left the organization).

c) Add new employees to the sample frame.

9.10.10. The Contractor must:

a) Adjust the sample frame on a weekly basis according to specifications provided by the Project Authority.

b) Send invitation emails containing confidential link to the survey (with embedded unique access code) to employees added to the sample frame and to employees whose email address has been modified.

c) Send up to three reminder emails to employees in the sample frame who did not complete the survey. Reminder emails must contain the confidential link to the survey (with embedded unique access code).

9.10.11. During the collection period, the Contractor must provide a weekly response rate update for the overall public service, departments/agencies, and organizational sub-units (second level only).

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| **Project Authority responsibility:** Provide second level organizational sub-units in the employee list. For an example of the number of second level organizational sub-units, please see column B in https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-organization.csv |

9.10.12. The Contractor must not collect IP addresses unless absolutely necessary to administer the survey. If IP addresses are deemed necessary, the Contractor must inform the Project Authority of reasons for collecting IP addresses, seek the Project Authority's approval, and delete all records of IP addresses at the time the online survey closes.

9.10.13. The Contractor must investigate and address the cause of abnormally low response rates in certain departments/agencies or organizational units to ensure email invitations are reaching recipients (e.g., email blocked by some undetected firewall or other IT issue). The Contractor must report any issues to the Project Authority.

## 9.11. Data Cleansing

9.11.01. The Contractor must:

a) Delete from the sample frame any employee who selected "Contracted via a temporary help services agency" or "Other (e.g., minister's exempt staff)" as their current employee status.

b) Provide the final sample frame to the Project Authority, including related employee information and flag indicating whether the employee has completed the survey or not. In cases where employee information is missing in the sample frame (e.g., department/agency name, occupational group and level), obtain this information from survey responses.

c) Delete duplicates from the sample frame according to Project Authority's specifications.

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| **Project Authority responsibility:** Provide specifications for deleting duplicates. |

d) Ensure effective data quality control measures, such as identifying outliers for certain demographic questions (e.g., occupational level not possible for a specific occupational group, occupational group does not exist within a certain department) and recoding responses if required. Notify the Project Authority of any outliers.

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| **Project Authority responsibility:** Provide specifications for identifying outliers and for recoding occupational groups, and other demographics if required. |

e) Apply weights to adjust data for non-response. Adjusting for non-response will employ, at the very least, department/agency and occupational group and category representation.

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| **Project Authority responsibility:** Provide weighing methodology to the Contractor. |

f) Remove unique identifiers from the dataset, so that there is no remaining link between survey responses, unique identifiers, email addresses and employee information provided in the employee list.

g) Destroy employee and email distribution lists after the final sample frame has been determined and weighting procedures completed. Inform Project Authority after this has been done.

9.12. **Datasets**

9.12.01. The Contractor must produce datasets as per the Project Authority's specifications for file layout and coding.

**Project Authority responsibility:** Provide example of file layout and coding.

9.12.02. The Contractor must:

a) Provide documentation of variable and value coding and labelling (in CSV format).

b) Provide dummy versions of requested aggregate datasets in 9.12.03.

c) Produce and deliver micro dataset containing the survey responses at the individual levels, using agreed-upon secure means of transfer. Provide a complete copy of the micro dataset in CSV format, and machine-readable formats (SPSS and SAS formats).

**Project Authority responsibility:** Provide specifications for variable and value labelling in both official languages.

d) Produce weighted aggregate data stripped of identifiers, as per Project Authority specifications.

e) Merge PSES aggregate data with the historical aggregate data (going back to the 2008 PSES) for repeated questions (broken down by department/agency and demographic characteristics).

**Project Authority responsibility:** Provide the Contractor with the historical aggregate data. Historical data will be provided in two datasets (CSV format). Example of historical datasets: https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-demo.csv
https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-group.csv

9.12.03. The Contractor must produce the following weighted aggregate datasets, as per Project Authority's specifications for file layout, variable and value labelling:

a) One (1) aggregate dataset (CSV format) **without** variable and value labelling containing PSES results over time (going back to the 2008 PSES) for the overall public service, departments and agencies, broken down by demographic characteristics. Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Subsets of this dataset may be requested by the Project Authority to reduce size or number of rows. (Example of dataset: https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats.csv)

b) One (1) aggregate dataset (CSV format) with variable and value labelling in both official languages containing PSES results over time (going back to the 2008 PSES) for the overall public service, departments and agencies, broken down by demographic characteristics. Demographic characteristics will include up to 6 derived demographic variables as specified by the Project Authority. Subsets of this dataset may be requested to reduce size of file or number of rows. This aggregate dataset should be split into two datasets to limit the number of rows in each file (Project Authority to provide specs for splitting the dataset). Example of datasets: (https://www.canada.ca/en/treasury-board-secretariat/services/innovation/public-service-employee-survey/2014-public-service-employee-survey-open-datasets.html, https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-group.csv)

**Project Authority responsibility:** Provide specifications for up to 6 derived demographic variables.

c) Up to 90 aggregate datasets (Excel format) with variable and value labelling in both official languages, one (1) dataset for each participating department or agency. Each Excel document will contain the PSES results over time (going back to the 2008 PSES) for the overall public service and the individual department or agency, broken down by demographic characteristics (in different Excel tabs). Demographic characteristics will include up to 6 derived variables as specified by the Project Authority.

**Project Authority responsibility:** Provide specifications for up to 6 derived demographic variables. Provide example of dataset.

d) One (1) aggregate dataset (CSV format) with variable and value labelling in both official languages containing PSES results for the overall public service, departments and agencies, broken down by up to 25 additional derived variables, as specified by Project Authority. Dataset will be used by the Project Authority to produce additional comparisons for individual organizations.

**Project Authority responsibility:** Provide specifications for up to 25 additional derived demographic variables. Provide example of dataset.

e) One (1) aggregate dataset (CSV format) with variable and value labelling in both official languages containing PSES results for the overall public service, departments and agencies, broken down by organizational units. Example of dataset: **https://www.canada.ca/content/dam/canada/tbs-sct/migration/psm-fpfm/modernizing-modernisation/pses-saff/data/2014-results-resultats-organization.csv)**

f) Up to 90 aggregate datasets (Excel format) with variable and value labelling in both official languages, one (1) dataset for each participating department or agency. Each Excel document will contain the PSES results for the individual department or agency, broken down by their organizational units.

**Project Authority responsibility:** Provide example of datasets.

9.12.04. The Contractor must provide documentation of final variable and value labelling in English and French (CSV format).

9.12.05. The Contractor must ensure that confidentiality suppression rules are applied throughout all aggregate datasets. Suppression rules are as follows:

a) Suppression of results for questions with fewer than 10 respondents (row counts between 1 and 9 respondents);

b) Suppression of results for questions with low cell counts (from 1 to 4 respondents in a response category) for sensitive questions (e.g., harassment, discrimination), as specified by the Project Authority; and

c) Suppression of entire row of results for sub-questions if results for main question are suppressed (e.g., suppression of results for sources of harassment if results for incidence of harassment are suppressed).

9.12.06. When suppression of results occurs, proceed as follows:

a) For aggregate datasets specified in section 9.12.03 a), b), d) and e), entire row containing the suppressed values is deleted (Project Authority to provide example).

b) For aggregate datasets specified in section 9.12.03 c) and f), suppressed values are shown as blank (Project Authority to provide example).

9.12.07. The Contractor must provide the Project Authority an opportunity to review all datasets. The Contractor must make requested adjustments to datasets in response to Project Authority's specifications.

9.12.08. After a period of three years following the end of this contract, the Contractor must destroy aggregated datasets, the micro-data file and any data/information associated with individual responses, respondents and federal public service employees. The Contractor must inform the Project Authority when this step has been completed.

## 9.13. Methodological Report

9.13.01. The Contractor must provide the Project Authority with the following documents describing the details of the survey methodology, in both official languages:

a) The narrative executive summary (in HTML5 and PDF/A formats).

b) The final methodological report, which must include the full description of the methodology used and all applicable appendices within the same document (in HTML5 and PDF/A formats).

c) The methodological report and executive summary must conform to the requirements specified by Library and Archives Canada.

d) The methodological report and executive summary must include relevant content as per the Public Opinion Research Final Report Checklist.

9.13.02. The Contractor must provide the Project Authority with the opportunity to review and provide comments on the report. The report must be finalized by the Contractor and approved by the Project Authority.

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| **Project Authority responsibility:** Submit methodological report and narrative summary to Library and Archives Canada (LAC) |

9.13.03. **The Narrative Executive Summary**

9.13.04. The English and French narrative executive summaries must include the following:

a) A cover page containing the following:

- The **POR registration number** as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
- the **contract number**, as assigned by Public Services and Procurement Canada (PSPC), and the **contract award date**;
- the **delivery date** (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research Contractor to the Project Authority);
- the **title of the project** same as the title included in the POR plan;
- the **name of the research Contractor** that entered into the contract;
- the **name of the client department or agency** sponsoring the research;
- for the English version, the statement "***Ce rapport est aussi disponible en français sur demande.***" and for the French version, the statement "***This report is also available in English upon request.***"; and
- the **departmental contact information** in the form of a generic email address.

b) a statement of the research **purpose** and **objectives**;
c) an **outline of how the results were used**, if possible, and if not, **how the information is expected to be used**;
d) a brief description of the **methodology used**;
e) a statement as to the extent to which the **findings can be extrapolated** to a broader audience; and
f) the **total contract value** of the POR project[4].

*Please note that graphics, charts, and tables should not be included in the narrative executive summaries.*

9.13.05. **The Final Methodological Report in English and French**

9.13.06. The English and French final methodological report must include the following:

a) A cover page containing the following information:
- The **POR registration number** as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
- the **contract number**, as assigned by Public Services and Procurement Canada (PSPC), and the **contract award date**;
- the **delivery date** (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research Contractor to the Project Authority);
- the **title of the project** same as the title included in the POR plan;
- the **name of the research Contractor** that entered into the contract;
- the **name of the client department or agency** sponsoring the research;
- for the English version, the statement "***Ce rapport est aussi disponible en français sur demande.***" and for the French version, the statement "***This report is also available in English upon request.***"; and
- the **departmental contact information** in the form of a generic email address.

b) the **narrative executive summary**;
c) the **appendices** as described below:
- a full set of tabulated data;
- sample size, sampling procedures, and dates of research fieldwork;
- weighting procedures, confidence interval, and the margin of error, if applicable;
- the response rate and method of calculation;
- a discussion of the potential for non-response bias;
- the research instruments in both languages and, if applicable, the test material in all languages in which they were used and tested; and
- all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.

9.13.07. The final Methodological report as well as the Executive summary and aggregate data must be submitted for publication to Library and Archives Canada (LAC) by the Project Authority, no later than 6 months after the end of field.

## 10. MEETINGS

### 10.01. Kick-Off Meeting

10.01.01. For the initial term of the Contract and for each option period, if exercised, the Contractor must attend a kick-off meeting with the Project Authority.

10.01.02. The Project Authority will provide the Contractor with any updates to the deliverables timeline as identified in section 11.01 during the Kick-Off Meeting and Regular Meetings, as required.

| |
|---|
| **Project Authority responsibility:** Schedule meeting. Provide any updated timelines, if required. |

10.02. **Regular Meetings with the Project Authority**

10.02.01. As and when requested by the Project Authority (approximately every two weeks), the Contractor must attend 1.5-hour meetings with the Project Authority, either in-person in the National Capital Region, or through virtual meetings, to discuss survey operations and schedule.

| |
|---|
| **Project Authority responsibility:** Schedule meetings. Provide any updated timelines, if required. |

10.03. **Information Sessions for Information Technology Contacts**

10.03.01. The Contractor must participate, in-person, to two information sessions aimed at departmental IT contacts (one in each official language) with participating departments/agencies in the National Capital Region. The two-hour information sessions will be held over two consecutive days, and scheduled approximately two to three months before the PSES launch.

10.03.02. The Contractor must obtain the Project Authority's pre-approval of any travel and living expenses associated with the Contractor's in-person attendance at least two Business Days prior to the proposed date of the travel.

10.03.03. The Contractor must fully explain how they plan to test individual departmental firewalls and security features to allow for acceptance of email invitations and test the survey links to ensure that they are functional. The Contractor must:

a) Contribute relevant explanatory slides for a PowerPoint presentation, in both official languages; and

b) Deliver an oral presentations, in both official languages.

| |
|---|
| **Project Authority responsibility:** Organize and host the information sessions and prepare a PowerPoint presentation template. |

10.04. **Information Sessions for Communications and Human Resources Contacts**

10.04.01. The Contractor must participate, in-person or via tele-conference, to two information sessions aimed at Communications and Human Resources (one in each official language) with participating departments/agencies in the National Capital Region.

10.04.02. The two-hour information sessions will be held over two consecutive days, and scheduled approximately two to three months before the PSES launch.

10.04.03. The Contractor must attend the meeting to answer questions from departments and agencies in both official languages.

| |
|---|
| **Project Authority responsibility:** Organize and host the information sessions. |

## 11. DELIVERABLES AND TIMELINES

11.01. The Contractor must perform tasks and produce deliverables within the following timelines:

| Milestone # | Tasks and Deliverables | Reference | Date (of applicable PSES year) |
|---|---|---|---|
| 1 | Updated deliverables and timelines | 11.01 | Early April |

| | | | |
|---|---|---|---|
| 1 | Proof of Concept (Web questionnaire prototype using the sample survey questions in Appendix 1 to Annex “A”) | 9.03 | One week after signing the contract |
| N/A | Weekly written status report | 9.04 | Weekly |
| 1 | PowerPoint slides for joint presentation to departmental IT contacts | 10.03.03.a) | Early June |
| 1 | Contractor attends a joint information session for departmental IT contacts | 10.03.01 | Early June |
| 1 | Report on the evaluation of accessibility of the online questionnaire showing conformance with WCAG 2.0 (or latest version at time of work request), level AA or higher. | 9.05.08.c) | Early June |
| 1 | Report on the evaluation of usability of the online questionnaire on mobile devices (including Blackberry 10) | 9.05.08.e) | Early June |
| 1 | Provide test links of online questionnaire to Project Authority | 9.05.08.f) | Early June |
| 1 | Conduct IT testing with departmental IT representatives | 9.05.09 | Mid-June |
| 1 | Draft paper questionnaire and inserts (with back to back English and French) | 9.06.05 | Early July |
| 1 | Final paper questionnaire and insert proofs (with back to back English and French) | 9.06.05 | Mid-July |
| 1 | Final Web questionnaire | 9.05 | End July |
| 2 | Mail paper questionnaires with inserts and postage-paid envelopes to departmental contacts (addresses provided by Project Authority) | 9.06.06 | Early August |
| 2 | Send email invitations to employees of the Treasury Board of Canada Secretariat for soft-launch | 9.10.02 | Week before survey launch |
| 2 | Send email invitations to employees to initiate online survey data collection | 9.10.03 | 3rd Monday of August |
| 2 | Contractor closes online survey data collection | b) | 6 weeks after start of data collection, or as required |
| 2 | Contractor closes acceptance of paper questionnaires | 9.06.07 | 10 weeks after start of data collection, or as required |
| 2 | Dummy aggregate dataset | 9.12.02.b) | Mid-November |
| 3 | Draft weighted micro dataset | 9.12.02.c)<br>9.12.07 | Mid-December |
| 3 | Final weighted micro dataset | 9.12.02.c) | Early January (following year) |

| | | | |
|---|---|---|---|
| 3 | Draft weighted aggregate datasets with cell suppression | 9.12.03.a)<br>9.12.03.b)<br>9.12.03.c)<br>9.12.03.d)<br>9.12.05<br>9.12.06<br>9.12.07 | Early January (following year) |
| 3 | Final weighted aggregate datasets with cell suppression | 9.12.03.a)<br>9.12.03.b)<br>9.12.03.c)<br>9.12.03.d)<br>9.12.05<br>9.12.06 | Mid-January (following year) |
| 3 | Draft weighted aggregate datasets with cell suppression | 9.12.03.e)<br>9.12.03.f)<br>9.12.05<br>9.12.06<br>9.12.07 | Early February (following year) |
| 3 | Final weighted aggregate datasets with cell suppression | 9.12.03.e)<br>9.12.03.f)<br>9.12.05<br>9.12.06 | Mid-February (following year) |
| 3 | Draft methodological report | 9.13 | Early March (following year) |
| 3 | Final methodological report | 9.13 | Mid-April (following year) |

## PART IV – OPTIONAL SERVICES

### 12. OPTION 1 – ADDITIONAL SURVEYS

12.01. In addition to the original target population as defined in section 6.01, the target population must also include employees at the National Capital Commission, Global Affairs Canada’s Locally Engaged Staff and Royal Canadian Mounted Police’s non-public servants (approximately 30,000 employees).

12.02. Estimated population – approximately 300,000 with an expected response rate of between 50% and 70%.

12.03. In addition to the work described in Part II and Part III, the Contractor must carry out the following tasks:

12.03.01. Provide separate response rates for the National Capital Commission, Locally Engaged Staff (Global Affairs Canada) and RCMP non-public servants. Response rates should be provided in one (1) Excel file. Weekly response rates specified in section 9.10.11, should exclude responses from the National Capital Commission, Locally Engaged Staff (Global Affairs Canada) and RCMP non-public servants.

12.03.02. Produce and deliver the following separate micro datasets (containing the survey responses at the individual level), using agreed-upon secure means of transfer.

a) One (1) micro dataset containing the results for employees in the National Capital Commission, Locally Engaged Staff (Global Affairs Canada) and RCMP non-public servants.

b) The micro dataset specified in 9.12.02.c), should exclude responses from the National Capital Commission, Locally Engaged Staff (Global Affairs Canada) and RCMP non-public servants.

12.03.03. Produce the following separate weighted aggregate datasets, as per the Project Authority's specifications for file layout, variable and value labelling:

a) **For the National Capital Commission**

i. One (1) aggregate dataset containing the PSES results over time (2018, 2017, 2014, 2011 and 2008) for the overall public service and the National Capital Commission, broken down by demographic characteristics (in different Excel tabs). Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Project Authority to provide example of dataset.

ii. One (1) aggregate dataset containing the 2018 PSES results for the National Capital Commission, broken down by organizational units. Project Authority to provide example of dataset.

b) **For Global Affairs Canada –** three (3) aggregate datasets (Excel format) with variable and value labelling in both official languages, that is one (1) dataset for each of the following combinations:

i. One (1) dataset containing the PSES results over time (2018, 2017, 2014, 2011 and 2008), broken down by demographic characteristics (in different Excel tabs) for <u>all</u> Global Affairs employees, including Locally Engaged Staff. Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Project Authority to provide example of dataset.

ii. One (1) dataset containing the PSES results over time (2018, 2017, 2014, 2011 and 2008), broken down by demographic characteristics (in different Excel tabs) for <u>only</u> Locally Engaged Staff. Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Project Authority to provide example of dataset.

iii. One (1) aggregate dataset containing the 2018 PSES results broken down by organizational units (if applicable), for <u>only</u> Locally Engaged Staff. Project Authority to provide example of dataset.

c) **For RCMP non-public servants**, three (3) aggregate datasets (Excel format) <u>with</u> variable and value labelling in both official languages, one (1) dataset for <u>each</u> of the following combinations:

i. One (1) dataset containing the PSES results over time (2018, 2017, 2014, 2011 and 2008), broken down by demographic characteristics (in different Excel tabs) for <u>all</u>

RCMP employees, including non-public servant. Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Project Authority to provide example of dataset.

ii. One (1) dataset containing the PSES results over time (2018, 2017, 2014, 2011 and 2008), broken down by demographic characteristics (in different Excel tabs) for only non-public service employees. Demographic characteristics will include up to 6 derived variables as specified by the Project Authority. Project Authority to provide example of dataset.

iii. One (1) aggregate dataset containing the 2018 PSES results broken down by organizational units (if applicable), for only non-public servants. Project Authority to provide example of dataset.

12.04. All other aggregate datasets specified in 9.12 should exclude the results for the National Capital Commission, Locally Engaged Staff (Global Affairs) and RCMP non-public servants.

## 13. OPTIONS 2 and 3 – SUPPLEMENTAL QUESTIONS

13.01. **Option 2 – Supplemental questions (up to 5 questions for up to 90 departments/agencies)**

13.01.01. The Project Authority will provide up to five (5), pre-tested, unique supplemental questions (no open-ended questions) per department/agency for up to 90 departments and agencies, as per the ranges specified in the basis of payment.

13.01.02. In addition to the Work described in Part II and Part III, the Contractor must ask each set of up to five supplemental questions to employees in their specific department and agency, at the end of the PSES, after responses to the main questionnaire have been completed and submitted.

**Project Authority responsibility**: Pre-testing the unique questions, and ensuring that they reflect Government of Canada best practices and standards.

13.02. **Option 3 – Supplemental questions (up to 10 questions for up to 90 departments/agencies)**

13.02.01. The Project Authority will provide up to ten (10), pre-tested, unique supplemental questions (no open-ended questions) per department/agency for up to 90 departments and agencies, as per the ranges specified in the basis of payment.

13.02.02. In addition to the Work described in Part II and Part III, the Contractor must ask each set of up to 10 supplemental questions to employees in their specific department and agency, at the end of the PSES, after responses to the main questionnaire have been completed and submitted.

**Project Authority responsibility**: Pre-test the unique questions, and ensuring that they reflect Government of Canada best practices and standards.

13.03. **Options 2 and 3: Common Requirements**

13.03.01. In addition to the work described in Part II and Part III, the Contractor must carry out the following tasks:

a) Program Online questionnaire with skip logic that allows departmental supplemental questions to be asked only to employees working in that specific department or agency (based on respondents' answer to a question in the core questionnaire). Skip logic should allow departmental supplemental questions to be asked at the end of the survey, after responses to the core questionnaire have been completed and submitted. The second part of the survey containing departmental supplemental questions would not require a progress bar.

b) In the micro dataset specified in section 9.12.02.c) include responses at the individual level for these departmental supplemental questions.

c) In the weighted aggregate datasets specified in 9.12.03c) and f), include the aggregated results for these supplemental questions in the corresponding departmental aggregate dataset.

13.03.02. Format and print proof of paper inserts containing supplemental questions for those departments/agencies that have added supplemental questions, with French and English, back to back. Send physical proof of paper inserts for Project Authority review and approval.

**Project Authority responsibility**: Provide specifications for paper insert. Review paper proofs of paper inserts and identify issues to be addressed the Contractor.

13.03.03. Print paper inserts containing supplemental questions for those departments/agencies that have added supplemental questions, with French and English, back to back. Enclose appropriate paper insert into middle of questionnaire booklets destined for a specified department.

**Project Authority responsibility**: Review and approve final proof of paper inserts.

## PART V – PARAMETERS

### 14. LOCATION OF WORK

14.01. Unless otherwise specified, the Work is expected to be completed at the Contractor's chosen place of business.

### 15. TRAVEL AND LIVING

15.01. Subject to 10.03.02, Canada will reimburse the Contractor for travel and living expenses associated with attendance to the kickoff meeting described in Section 10.01 the Information Sessions for Information Technology Contacts described in Section 10.03.

### 16. OFFICIAL LANGUAGES

16.01. The Contractor must produce all reports and final deliverables in both official languages.

16.02. The Contractor's Resources must be able to communicate effectively in English or French, as applicable, both orally and in writing, without assistance and with minimal errors.

### 17. CONSTRAINTS

17.01. The Contractor must perform the Work in compliance with applicable laws, regulations, standards, and directives, including:

a) Financial Administration Act;

b) Library and Archives of Canada Act;

c) Public Opinion Research Contract Regulations;

d) Official Languages Act;

e) Policy on Communications and Federal Identity;
f) Privacy Act;
g) Access to Information Act;
h) Personal Information Protection and Electronic Documents Act;
i) Directive on the Management of Communication;
j) Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys;
k) Standards for the Conduct of Government of Canada Public Opinion Research—Online Surveys; and
l) Marketing Research and Intelligence Association's Code of Conduct.

17.02. **Online Questionnaire**

17.02.01. The Contractor must ensure that the online questionnaire conforms to or exceeds the specifications outlined in the following:

a) Standard on online Accessibility. Online questionnaire must meet level AA or higher of the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request)
b) Standard on Web Usability
c) Canada.ca Content Style Guide
d) Canada.ca Content & Information Architecture Specification
e) Standard on Web Interoperability
f) Standard on Optimizing Websites and Applications for Mobile Devices
g) Canada recommends using the Web Experience Toolkit (WET) to assist in meeting the above stated standards.

17.02.02. In accordance with the Treasury Board Standard on Web Accessibility, the Contractor must ensure that the Web questionnaire meets all conformance requirements specified in the most current Treasury Board Standard on Web Accessibility at the time of the work request.

17.02.03. Prior to the commencement of any operational activity (e.g. launch or pre-launch), subject-matter experts representing Canada will assess if the Web questionnaire conforms to the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request), level AA or higher. If Canada determines that the Web questionnaire fails to conform to the Web Content Accessibility Guidelines (WCAG) 2.0 (or latest version at time of work request), level AA or higher, the Contractor must develop a strategy and timeline for reaching full compliance, for approval by the Project Authority, and must take all necessary corrective actions to achieve compliance. During the compliance assessment, Canada may determine that critical elements of the Web Content Accessibility Guidelines (WCAG) 2.0 conformance requirements must be met prior to the commencement of any operational activity. After corrective actions have been completed, Canada will reassess to ensure full compliance has been met.

17.02.04. Failure to meet any of these conditions constitutes grounds for Canada to terminate the contract.

17.03. **Protection of Data/Servers**

17.03.01. The Contractor must:

a) Use up-to-date technologies to protect survey data collected or stored on Web sites or servers against illegal or unsanctioned access by third parties (i.e. "hacking").
b) Control access to all databases on which any data relating to the survey is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).

c) Ensure that:

i. All data is stored on Canadian servers and Canadian back-up servers.

ii. All servers, including back-up servers, on which any data relating to the survey is stored are physically and logically independent from all other databases, unless those databases are located in Canada

iii. All data relating to the survey is processed only in Canada.

iv. All aspects of fieldwork and data processing are conducted and only accessible in Canada.

17.03.02. In the event of a privacy breach, the Contractor must:

a) Notify the Project Authority immediately; and

b) Report, respond to and manage any privacy breach in accordance with the *Personal Information Protection and Electronic Documents Act*.

17.04. The Contractor must ensure that the methodological report and aggregate datasets conform to the requirements specified by Library and Archives Canada.

**APPENDIX 1 to ANNEX"A"**
**SAMPLE SURVEY QUESTIONS FOR PROOF OF CONCEPT**

**Version Française** *(must provide the option to toggle between the English and French versions)*

**2018 Public Service Employee Survey**

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| ***My Job*** | | | | | | | | |
| | | Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know | Not applicable |
| 1 | I have the materials and equipment I need to do my job. *(only one answer can be selected)* | O | O | O | O | O | O | O |
| | | Always/almost always | Often | Sometimes | Rarely | Never/almost never | Don't know | Not applicable |
| 2 | I feel that the quality of my work suffers because of... | | | | | | | |
| a. | constantly changing priorities. *(only one answer can be selected)* | O | O | O | O | O | O | O |
| b. | lack of stability in my department or agency. *(only one answer can be selected)* | O | O | O | O | O | O | O |
| ***My Organization (Department or Agency)*** | | | | | | | | |
| | | Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know | Not applicable |
| 3 | My department or agency does a good job of communicating its vision, mission and goals. | O | O | O | O | O | O | O |

## Mobility and Retention

4 Do you intend to leave your current position in the next two years?

○ Yes **(Go to next question)**

○ No **(Go to question 6)**

○ Not sure **(Go to question 6)**

5 Please indicate your reason for leaving. (Mark one only.)

○ To retire

○ To pursue another position within my department or agency

○ To pursue a position in another department or agency

○ To pursue a position outside the federal public service

○ End of my term, casual or student employment

○ Other

## Harassment

***Harassment is normally a series of incidents, but it can be one severe incident that has a lasting impact on the individual.***

*Harassment is any improper conduct by an individual that is directed at and offensive to another individual in the workplace, including at any event or any location related to work, and that the individual knew or ought reasonably to have known would cause offence or harm. It comprises objectionable act(s), comment(s) or display(s) that demean, belittle, or cause personal humiliation or embarrassment, and any act of intimidation or threat. It also includes harassment within the meaning of the Canadian Human Rights Act (i.e., based on race, national or ethnic origin, colour, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, genetic characteristics (including a requirement to undergo a genetic test, or disclose the results of a genetic test), disability or conviction for an offence for which a pardon has been granted or in respect of which a record suspension has been ordered).*

6 Having carefully read the definition of harassment, have you been the victim of harassment on the job in the past two years?

○ Yes **(Go to next question)**

○ No **(Go to question 8)**

7 From whom did you experience harassment on the job? (Mark all that apply.)

○ Co-workers

○ Individuals with authority over me

○ Individuals working for me

○ Individuals for whom I have a custodial responsibility (e.g., inmates, offenders, patients, detainees)

○ Individuals from other departments or agencies

○ Members of the public (individuals or organizations)

○ Other

8 Please estimate the number of hours you have spent, at work or outside of work, attempting to resolve your pay or other compensation issue(s)?

Specify number of hours. (drop-down menu, from 0 to 100)

***General Information***

*The following questions ask for general information that will be used to better understand the survey results. To ensure confidentiality, please be advised that your responses will be grouped with those of other respondents in your department or agency. Individual responses and results for very small groups are never published or shared with government department or agencies.*

9 Department/Agency (Drop-down menu containing approximately 90 departments/agencies)

10 Do you currently work according to any of the following flexible working arrangements? *(Mark all that apply.)*

- ○ Compressed workweek
- ○ Flexible work schedule (i.e., variable start and end times)
- ○ Telework
- ○ Job sharing
- ○ Income averaging
- ○ Pre-retirement transition leave

**OR**

- ○ I do not work according to one of these flexible working arrangements. (if respondent clicks this, they cannot click one of the above radio-buttons)

11 Please indicate your occupational group and level. *(should be side by side drop-down menus, one for occupational group, the other one for level)*

(*If you are in an acting position, specify the group of the acting position. For a list of definitions of abbreviations, please click on the "help" button.* *(The help button should link to another web page containing the list of occupational groups with their definition)*

Occupational Group (drop-down menu containing approximately 120 occupational groups, e.g., AS, EC, EN)

Level (drop-down menu from 0 to 20)

12 What is your gender?

*(Refers to current gender which may be different from sex assigned at birth and may be different from what is indicated on legal documents.)*

- ○ Male
- ○ Female
- ○ Or please specify

Please specify your gender here ________________________ (maximum 150 characters)

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

*Please see Excel Spreadsheet labelled "Annex B – Basis of Payment" and available for download on buyandsell.gc.ca*

## ANNEX “C”
## TECHNICAL EVALUATION CRITERIA

| EVALUATION SUMMARY | | |
|---|---|---|
| **1. MANDATORY EVALUATION CRITERIA** | **☐ MET** | **☐ NOT MET** |
| **2. POINT RATED EVALUATION CRITERIA** | Minimum Score | Maximum Score |
| **R.1: Understanding the requirements and tasks listed in Statement of Work and demonstrating ability to carry them out** | **120** | **200** |
| **R.2: Demonstrating Capability** | **180** | **300** |
| a) Server capacity | 60 | 100 |
| b) Anticipating, identifying and resolving IT-related issues | 60 | 100 |
| c) Accessibility of Web questionnaire | 60 | 100 |
| **R.3: Resource Qualifications – Survey Manager** | **20** | **50** |
| a) Academic qualifications | 5 | 20 |
| b) Work experience | 15 | 30 |
| **R.4: Resource Qualifications – Senior Researcher** | **20** | **100** |
| a) Academic qualifications | 5 | 20 |
| b) Work experience | 15 | 30 |
| c) Sample project | 0 | 50 |
| **R.5: Corporate Experience – Sample Projects** | **70** | **300** |
| a) Experience and expertise of the Bidder | 50 | 150 |
| b) Number of respondents | 5 | 75 |
| c) Target population | 15 | 75 |
| **OVERALL TOTAL** | **570*** | **950** |

***In addition to all of the above minimum sub-section scores, the bidder must also obtain an overall minimum score of 570 points out of a total of 950 points.**

## 1. MANDATORY EVALUATION CRITERIA

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

### M.1a: SURVEY MANAGER

The Bidder must identify one (1) Survey Manager responsible for client liaison and immediate supervision of all aspects of the projects. The Survey Manager will be evaluated in the Point Rated Technical Evaluation R3 – Resource Qualifications - Survey Manager.

The survey manager must have, at a minimum, a relevant* college diploma or university degree and must possess at minimum, five (5) years of relevant experience managing quantitative public opinion research projects.

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

### M.1b: SENIOR RESEARCHER(S)

The Bidder must identify at least one (1) Senior Researcher responsible for the conduct of all aspects of the projects. The Senior Researcher will be evaluated in the Point Rated Technical Evaluation R4 – Resource Qualifications - Senior Researcher.

The Senior Researcher must have, at a minimum, a relevant* college diploma or university degree and must possess at minimum, five (5) years of relevant experience conducting quantitative public opinion research projects.

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

### M.2: CORPORATE EXPERIENCE - SAMPLE PROJECTS

To demonstrate the Bidder's experience, the Bidder must submit no more than three (3) quantitative online public opinion research (POR) sample projects. Sample projects will be evaluated in the Point Rated Technical Evaluation R5 – Corporate Experience – Sample Projects. Please use Appendix 1 to Annex "C - Project Submission Form to submit project samples. Only the first three (3) projects submitted in response to M.2 will be evaluated.

The submitted quantitative POR projects must meet the following criteria:

a) Final deliverables for all projects must have been completed in the last five (5) years preceding the bid closing date.
b) Bidder includes a brief attestation of performance for all projects signed by the client or confirmed by the client by email for each project submitted. The attestations should clearly reference the specific project and state that the work was conducted to the satisfaction of the client. A client attestation template is included as Appendix 2 to Annex "C".
c) At least one of the submitted projects has a total of at least 2,500 respondents.
d) At least one of the submitted projects has Canadian federal, provincial/territorial or municipal employees as the target population.
e) Each of the following tasks has been carried out in at least one of the submitted projects: (Note that different tasks can be assigned to any of the submitted projects, provided that each task was carried out by the Bidder in at least one of the projects.)

i. Programming English and French versions of a Web questionnaire with ability to toggle between English and French versions.
ii. Providing services in both official languages (e.g, client liaison, telephone help-line, mailbox)
iii. Programming a Web questionnaire involving complex skip logic
iv. Dealing with challenging IT situations and implementing mitigation strategies, (e.g. IT environment/troubleshooting of IT issues)
v. Ensuring usability of Web questionnaire on mobile devices
vi. Ensuring usability of Web questionnaire with adaptive technologies (e.g., screen readers)
vii. Setting up and maintaining a generic email account for respondents (e.g., to answer respondent questions)
viii. Setting up and maintaining a telephone help line for respondents (e.g., to answer respondent questions)
ix. Sending email invitations containing a link to the survey with an embedded unique access code
x. Collecting and verifying bounce-back email invitations
xi. Conducting dataset quality control
xii. Calculating response rates in accordance with MRIA standards
xiii. Producing weights and adjusting results for non-response
xiv. Applying suppression rules to protect the confidentiality of responses
xv. Producing aggregate datasets
xvi. Writing a methodological report

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

## 2. POINT RATED TECHNICAL EVALUATION CRITERIA

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

### R.1: UNDERSTANDING THE REQUIREMENTS AND TASKS LISTED IN THE STATEMENT OF WORK AND DEMONSTRATING ABILITY TO CARRY THEM OUT

**Submission Requirements**

The Bidder should provide a response to R.1 that reflects its understanding of the following Statement of Work requirements and demonstrates its approach to carrying them out. The Bidder should also provide a description of potential challenges/problems that could arise and how each will be addressed.

a) Programming English and French versions of a Web questionnaire with option to toggle between English and French
b) Programming a Web questionnaire involving complex skip logic
c) Sending email invitations containing a link to the survey with an embedded unique access code
d) Collecting and verifying bounce-back email invitations
e) Conducting dataset quality control
f) Producing weights and adjusting results for non-response
g) Applying suppression rules to protect the confidentiality of responses
h) Producing aggregate datasets

Simply repeating the requirements and tasks listed in the Statement of Work, in whole or in part, does not indicate an understanding of the requirements and tasks, or the ability to carry them out.

**Evaluation**

The response will be evaluated using Scale 1 (Understanding) on the degree to which it demonstrates that the Bidder understands the requirements and tasks listed in the Statement of Work, the likelihood that the Bidder will meet the requirement, as well as the perceived Residual Risk to Canada.

**Minimum Score:** 120 points
**Maximum Score:** 200 points
**Scoring Rubric:** Scale 1 (Understanding)

| SCALE 1 | Understanding |
|---|---|
| Points | Rating Level |
| **Unacceptable (0%)** | No information provided or the Bidder’s Response does not address the RFP requirement. |
| **Minimally addressed (20%)** | The Bidder’s Response demonstrates little understanding of the requirements. The Response has significant weaknesses, and the Bidder appears unlikely to meet the requirements. The Response poses a perceived large Residual Risk to Canada. |

| | |
|---|---|
| **Partially addressed (40%)** | The Bidder's Response demonstrates some understanding of the requirements. The Response has weaknesses, and the Bidder appears unlikely to meet the requirements or be effective. The Response poses a perceived medium Residual Risk to Canada. |
| **Satisfactorily addressed (60 %)** | The Bidder's Response demonstrates an adequate understanding of the requirements. The Response has minor weaknesses but the Bidder appears likely to meet the requirement. The Response poses a perceived medium-low Residual Risk to Canada. |
| **Very well addressed (80%)** | The Bidder's Response demonstrates a very good understanding of the requirements. The Response has no significant weaknesses, and the Bidder appears likely to meet requirements, is likely to be effective and yield very good results. The Response poses a perceived low Residual Risk to Canada. |
| **Excellently addressed (100%)** | The Bidder's Response demonstrates an excellent understanding of the requirements. The Response has no apparent weaknesses, and the Bidder appears likely to meet the requirements, is likely to be effective, and yield excellent results. The Response poses very little or no apparent Residual Risk to Canada |
| | |
| *Interpretation Notes* | **Residual Risk** means the risk that remains after the Bidder's risk mitigations are considered. |

| **R.2: DEMONSTRATING CAPABILITY** |
|---|
| **Minimum Score (R2a, R2b, and R2c):** 180 points<br>**Maximum Score (R2a, R2b, and R2c):** 300 points |

| **a) Server Capacity** |
|---|
| **Criterion** |
| The Bidder should have capacity to handle a large scale survey. |
| **Submission Requirements** |
| The Bidder should provide evidence that its Canadian servers and back up servers have the capacity to handle a large scale survey *, including sending a large number of email invitations containing links to the survey with embedded unique access codes, and handling a large number of concurrent connections. The Bidder should also provide a description of potential challenges/problems that could arise and how each will be addressed, as well as information on the Bidder's relevant experience.<br><br>*A total of approximately 300,000 email invitations will be sent over a maximum period of 5 consecutive weekdays. |
| **Evaluation** |
| The response will be evaluated using Scale 2 (Capability). |
| **Minimum Score:** 60 points<br>**Maximum Score:** 100 points<br>**Scoring Rubric:** Scale 2 (Capability) |

| **SCALE 2** | **CAPABILITY** |
|---|---|
| Points | Rating Level |

| | |
|---|---|
| **No Capability (0%)** | No information provided or the Bidder's Response does not address the RFP requirement. |
| **Partial Capability (40%)** | The Response demonstrates that the Bidder meets some of the criteria with moderate to significant Weaknesses that are not offset by Strengths. The Bidder demonstrates partial capability and an approach and/or experience of some relevance to the Project. |
| **Adequate Capability (60 %)** | The Response demonstrates that the Bidder meets most of the criteria with few Weaknesses that are not offset by Strengths. The Bidder demonstrates adequate capability and an approach and/or experience that is relevant to the Project. |
| **Good Capability (80%)** | The Response demonstrates that the Bidder meets all of the criteria with only minor Weaknesses that are not offset by Strengths. The Bidder demonstrates good capability and an approach and/or experience that is very relevant to the Project. |
| **Excellent Capability (100%)** | The Response demonstrates that the Bidder meets all of the criteria with no Weaknesses. The Bidder demonstrates an excellent level of capability and an approach and/or experience that is highly relevant to the Project. |
| | |
| *Interpretation Notes* | **Strength** means an aspect that has merit or exceeds specified capability requirements in a way that will be advantageous to the Project.<br><br>**Weakness** means a failure to fully demonstrate capability to meet a requirement. |

| **b) Anticipating, identifying and resolving IT-related issues** |
|---|
| **Criterion** |
| The Bidder should have the ability to anticipate, identify and resolve IT-related issues such as departmental firewall restrictions, Web interoperability and the usability of the Web Questionnaire on mobile devices. |
| **Submission Requirements** |
| The Bidder should demonstrate its ability to anticipate, identify and resolve IT-related issues, such as departmental firewall restrictions, Web interoperability and the usability of the Web questionnaire on mobile devices. The Bidder should also provide a description of potential challenges/problems that could arise and how each will be addressed, as well as information on the Bidder's relevant experience. |
| **Evaluation** |
| The response will be evaluated using Scale 2 (Capability). |
| **Minimum Score:** 60 points<br>**Maximum Score:** 100 points<br>**Scoring Rubric:** Scale 2 (Capability) |

| **c) Accessibility of Web Questionnaire** |
|---|
| **Criterion** |

| |
|---|
| The Bidder's Web Questionnaire should conform to Web Content Accessibility Guidelines (WCAG) 2.0 Level AA or higher (or latest standard at time of bid closing). |
| **Submission Requirements** |
| The Bidder should demonstrate how they will ensure that the Web questionnaire conforms with the most current Treasury Board *Standard on Web Accessibility* at time of bid closing, and how the Bidder will ensure the Web questionnaire remains compliant over the course of the contract:<br>1) Describe in detail the design and testing approaches, as well as the tools and mechanisms that will be used to assess the accessibility of the Web questionnaire (minimum 30 points – maximum 50 points)<br>2) Confirm if the platform that will be used for the Web questionnaire currently conforms to WCAG 2.0, and indicate the level of WCAG 2.0 conformance achieved by the platform (minimum 30 points – maximum 50 points):<br>a) If the platform currently conforms to WCAG 2.0 Level AA, share the testing report or a completed Web Experience Toolkit questionnaire (https://ssl-templates.services.gc.ca/app/cls/wet/intranet/v4_0_16/demos/wamethod/wamethod-AAA-en.html).<br>b) If the platform does not currently conform to WCAG 2.0 Level AA, share a roadmap to achieving compliance for the Web questionnaire. |
| **Evaluation** |
| The response will be evaluated using Scale 1 (Understanding). |
| **Minimum Score:** 60 points<br>**Maximum Score:** 100 points<br>**Scoring Rubric:** Scale 1 (Understanding) |

| **R.3: RESOURCE QUALIFICATIONS – SURVEY MANAGER** |
|---|
| **Minimum Score (R.3.a, and R.3.b):** 20 points<br>**Maximum Score (R.3.a, and R.3.b):** 50 points |

The CV of the proposed Survey Manager will be evaluated as follows:

**a) Academic qualifications / training / certifications / publications / awards and memberships** relevant to the design, conduct and reporting of quantitative public opinion research.

**(Minimum 5 points, Maximum 20 points)**

| **Name of Survey Manager** | **Academic Qualifications** (10 points) | | | **Certifications / Training** (4 points) | **Publications**** (4 points) | **Awards and Memberships** (2 points) | **Total Points** (20 points) |
|---|---|---|---|---|---|---|---|
| | College – relevant* (5 points)<br>University – not relevant* (5 points)<br>University – relevant* (10 points) | | | (Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences) | (Academic papers, professional association articles, reports) | (e.g., Marketing Research Intelligence Association, etc.) | |
| | /5 | /5 | /10 | (2 points for each item identified up to the category total) | | | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | /20 |
| | | | | | | Total Points | /20 |

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

***Publications are defined as those written in your own name or under the name of a company*

b) **Work experience** –The Bidder should provide the total number of years of experience relevant to managing quantitative public opinion research projects for the Survey Manager. **(Minimum 15 points, Maximum 30 points)**

| **Name of Survey Manager** | **Overall number of years of relevant experience** | | | | **Total Points** (30 points) |
|---|---|---|---|---|---|
| | **Greater than or equal to 5 years but less than or equal to 8 years** (15 points - minimum requirement) | **Greater than 8 years but less than or equal to 11 years** (20 points) | **Greater than 11 years but less than or equal to 15 years** (25 points) | **Greater than 15 years** (30 points) | |
| | | | | | /30 |
| | | | | Total Points | /30 |

| **R.4: RESOURCE QUALIFICATIONS – SENIOR RESEARCHER(S)** |
|---|
| **Minimum Score (R.4.a, and R.4.b):** 20 points<br>**Maximum Score (R.4.a, and R.4.b):** 100 points |

The CV of up to two Senior Researchers working on the project will be evaluated as follows:

**a) Academic qualifications / training / certifications / publications / awards and memberships** relevant to the design, conduct and reporting of quantitative public opinion research. **(Minimum 5 points, Maximum 20 points)**

| **Name of Senior Researcher** | **Academic Qualifications** (10 points) | **Certifications / Training** (4 points) | **Publications**** (4 points) | **Awards and Memberships** (2 points) | **Total Points** (20 points) |
|---|---|---|---|---|---|
| | College – relevant* (5 points)<br><br>University – not relevant* (5 points)<br><br>University – relevant* (10 points) | (Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences) | (Academic papers, professional association articles, reports) | (e.g., Marketing Research Intelligence Association, etc.) | |

| | /5 | /5 | /10 | (2 points for each item identified up to the category total) | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | /20 |
| | | | | | | | /20 |
| | | | | | | Total Average Points | /20 |

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

***Publications are defined as those written in your own name or under the name of a company*

**b)** **Work experience** –The Bidder should provide the total number of years of experience relevant to conducting and reporting on quantitative public opinion research for up to two Senior Researchers. **(Minimum 15 points, Maximum 30 points)**

The points will be for up to two Senior Researchers working on the project.

| **Name of Senior Researcher** | **Overall number of years of relevant experience** | | | | **Total Points** (30 points) |
|---|---|---|---|---|---|
| | **Equal to 5 years but less than or equal to 8 years** (15 points - minimum requirement) | **Greater than 8 years but less than or equal to 11 years** (20 points) | **Greater than 11 years but less than or equal to 15 years** (25 points) | **Greater than 15 years** (30 points) | |
| | | | | | /30 |
| | | | | | /30 |
| | | | | Total Average Points | /30 |

**c)** **Sample project** – The Bidder should provide one (1) quantitative public opinion research (POR) sample project completed in the last five years for each Senior Researcher proposed to work on the project. Projects completed beyond 5 years will not be evaluated further. Sample project(s) can be the same as the project(s) submitted as part of M2, but do not have to be. **(Minimum 0 points, Maximum 50 points)**

Bidders should use Appendix 1 to Annex "C" – Project Submission Form for each project submitted.

The Bidder should demonstrate that the project met the requirements or involved tasks listed the following table.

| Name of Senior Researcher | Online Survey | 2500 or more respondents | Sending email invitations containing a link to the survey with an embedded unique access code | Programming Web questionnaire involving complex skip logic | Conducting dataset quality control | Producing weights and adjusting results for non-response | Applying suppression rules to protect the confidentiality of responses | Calculating response/participation rates in accordance with MRIA standards | Producing aggregate dataset | Writing a methodological report | **Total Points** (50 points) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | /5 | /5 | /5 | /5 | /5 | /5 | /5 | /5 | /5 | /5 | |
| | | | | | | | | | | | /50 |
| | | | | | | | | | | | /50 |
| Total Average Points | | | | | | | | | | | /50 |

| **R.5: CORPORATE EXPERIENCE -SAMPLE PROJECTS** |
|---|
| **Minimum Score (R.5.a, R.5.b, and R.5.c):** 70 points<br>**Maximum Score (R.5.a, R.5.b, and R.5.c):** 300 points |

The projects submitted under Mandatory requirement M.2, will be evaluated under this point rated evaluation criterion.

Bidders should use Appendix 1 to Annex “C” – Project Submission Form for each project submitted.

The Bidder must demonstrate how the project was relevant to each Statement of Work requirement listed below.

Projects will be evaluated based on the following criteria:

a. The experience and expertise of the Bidder, as demonstrated in the sample projects, is relevant to the statement of work requirements **(Minimum 50 points - Maximum 150 points)**

| Statement of Work Requirement | **Point value per project** (no partial points) | Project 1 | Project 2 | Project 3 | Total points |
|---|---|---|---|---|---|
| Programming English and French versions of a Web questionnaire with ability to toggle between English and French versions | 2 points | | | | /6 |
| Providing services in both official languages (e.g, client liaison, telephone help-line, mailbox) | 2 points | | | | /6 |
| Programming Web questionnaire involving complex skip logic | 2 points | | | | /6 |

| | | | | | |
|---|---|---|---|---|---|
| Dealing with challenging IT situations and implementing mitigation strategies, e.g. IT environment/troubleshooting of IT issues | 5 points | | | | /15 |
| Ensuring usability of Web questionnaire on mobile devices | 5 points | | | | /15 |
| Ensuring usability of Web questionnaire with adaptive technologies (e.g., screen readers) | 5 points | | | | /15 |
| Setting up and maintaining a generic email account for respondents (e.g., to answer respondent questions) | 2 points | | | | /6 |
| Setting up and maintaining a telephone help line for respondents (e.g., to answer respondent questions) | 2 points | | | | /6 |
| Sending email invitations containing a link to the survey with an embedded unique access code | 5 points | | | | /15 |
| Collecting and verifying bounce-back email invitations | 2 points | | | | /6 |
| Conducting dataset quality control | 2 points | | | | /6 |
| Calculating response/participation rates in accordance with MRIA standards | 2 points | | | | /6 |
| Producing weights and adjusting results for non-response | 5 points | | | | /15 |
| Applying suppression rules to protect the confidentiality of responses | 2 points | | | | /6 |
| Producing aggregate datasets | 5 points | | | | /15 |
| Writing a methodological report | 2 points | | | | /6 |
| | | | | Total Points | /150 |

b. Number of respondents **(Minimum 5 points - Maximum 75 points)**

| Number of respondents | Point value per project | Project 1 | Project 2 | Project 3 | Total |
|---|---|---|---|---|---|
| 20,000 or more | 25 points per project | | | | |
| 15,000-19,999 | 20 points per project | | | | |

| | | | | | |
|---|---|---|---|---|---|
| 10,000-14,999 | 15 points per project | | | | |
| 5,000-9,999 | 10 points per project | | | | |
| 2,500-4,999 | 5 points per project | | | | |
| Fewer than 2,500 respondents | 0 points per project | | | | |
| | | | | Final Score (total points) | /75 |

c. Target population **(Minimum 15 points - Maximum 75 points)**

| Target population | Point value per project | Project 1 | Project 2 | Project 3 | Total |
|---|---|---|---|---|---|
| Canadian federal public servants | 25 points per project | | | | |
| Canadian provincial/territorial or municipal public servants | 15 points per project | | | | |
| Other | 0 points per project | | | | |
| | | | | Final Score (total points) | /75 |

**APPENDIX 1 to ANNEX "C"**
**PROJECT SUBMISSION FORM**

*Please see Word Document labelled "Appendix 1 to Annex C"*
*and available for download on buyandsell.gc.ca*

**APPENDIX 2 to ANNEX "C"**
**CLIENT ATTESTATION TEMPLATE**

Name of contractor: ________________________

Project title: ______________________________

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

_____________________________
Signature

______________________
Date

# ANNEX "D"
# SECURITY REQUIREMENTS CHECK LIST

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat: 18-203

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: Treasury Board of Canada Secretariat

2. Branch or Directorate / Direction générale ou Direction: Governance, Policy and Planning (6Pr,

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

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

4. Brief Description of Work / Brève description du travail
TBS is required to conduct a survey of all federal public service employees. The survey will contain up to 145 opinion and demographic questions and will focus on TBS policies and government priorities (e.g. harassment, well-being, leadership etc.) The survey will be conducted as a census, but participation is voluntary.

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

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

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

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

| Canada | NATO / OTAN | Foreign / Étranger |
|---|---|---|
| [x] | [ ] | [ ] |

7. b) Release restrictions / Restrictions relatives à la diffusion

| Canada | NATO / OTAN | Foreign / Étranger |
|---|---|---|
| No release restrictions / Aucune restriction relative à la diffusion [x] ch | All NATO countries / Tous les pays de l'OTAN [ ] | No release restrictions / Aucune restriction relative à la diffusion [ ] |
| Not releasable / À ne pas diffuser [x] ch | | |
| Restricted to: / Limité à : [ ] | Restricted to: / Limité à : [ ] | Restricted to: / Limité à : [ ] |
| 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

| Canada | NATO / OTAN | Foreign / Étranger |
|---|---|---|
| PROTECTED A / PROTÉGÉ A [ ] | NATO UNCLASSIFIED / NATO NON CLASSIFIÉ [ ] | PROTECTED A / PROTÉGÉ A [ ] |
| PROTECTED B / PROTÉGÉ B [x] | NATO RESTRICTED / NATO DIFFUSION RESTREINTE [ ] | PROTECTED B / PROTÉGÉ B [ ] |
| PROTECTED C / PROTÉGÉ C [ ] | NATO CONFIDENTIAL / NATO CONFIDENTIEL [ ] | PROTECTED C / PROTÉGÉ C [ ] |
| CONFIDENTIAL / CONFIDENTIEL [ ] | NATO SECRET / NATO SECRET [ ] | CONFIDENTIAL / CONFIDENTIEL [ ] |
| SECRET / SECRET [ ] | COSMIC TOP SECRET / COSMIC TRÈS SECRET [ ] | SECRET / SECRET [ ] |
| TOP SECRET / TRÈS SECRET [ ] | | TOP SECRET / TRÈS SECRET [ ] |
| TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) [ ] | | TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) [ ] |

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat

Security Classification / Classification de sécurité

**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?
If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :
TA ☑ No / Non ☐ Yes / Oui

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?
TA ☑ 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

| | | | |
|---|---|---|---|
| ☑ RELIABILITY STATUS / COTE DE FIABILITÉ | ☐ CONFIDENTIAL / CONFIDENTIEL | ☐ SECRET / SECRET | ☐ TOP SECRET / TRÈS SECRET |
| ☐ TOP SECRET– SIGINT / TRÈS SECRET – SIGINT | ☐ NATO CONFIDENTIAL / NATO CONFIDENTIEL | ☐ NATO SECRET / NATO SECRET | ☐ COSMIC TOP SECRET / COSMIC TRÈS SECRET |
| ☐ 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?
TA ☐ 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 TA

**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?
TA ☐ 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?
TA ☑ 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?
TA ☑ 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?
TA ☐ 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?
TA ☑ No / Non ☐ Yes / Oui

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada

TA
11. a) The supplier must use Encrypted Methods to receive and store Protected B information on its Premises. e.g. Using Entrust for Electronic transaction or Encrypted Drives for storage and Physical Transfer of DATA.
TA
11. d) The supplier's Premises and its IT systems must be Approved by CISD for Storing and Processing Protected B information.

Government of Canada Gouvernement du Canada

| Contract Number / Numéro du contrat |
|---|
| |
| Security Classification / Classification de sécurité |
| |

**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 A | B | C | CONFIDENTIAL CONFIDENTIEL | SECRET | TOP SECRET TRÈS SECRET |
| 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, classifier 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, classifier le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).**

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat

Security Classification / Classification de sécurité

PART D - AUTHORIZATION / PARTIE D - AUTORISATION

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

| Name (print) - Nom (en lettres moulées) | Title - Titre | Signature |
|---|---|---|
| Stevan Zonjic | Director, Analysis and Measurement | Stevan Zonjic |

| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---|---|---|---|
| 613-222-1767 | | stevan.zonjic@tbs-sct.gc.ca | 9/11/2017 |

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

| Name (print) - Nom (en lettres moulées) | Title - Titre | Signature |
|---|---|---|
| Jodi Doyle | Director. | |

| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---|---|---|---|
| | | | 2018-01-26 |

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) | Title - Titre | Signature |
|---|---|---|
| | | |

| Telephone No. - N° de téléphone | Facsimile No. - N° de télécopieur | E-mail address - Adresse courriel | Date |
|---|---|---|---|
| | | | |

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

Cynthia Laverdure
Contract Security Officer- Agente à la sécurité des contrats
Industrial Security Sector- Secteur de la Sécurité industrielle
cynthia.laverdure@pwgsc.gc.ca
Telephone: 613-948-1636

Signature: C. Laverdure.

dress - Adresse courriel

Date: 2018-01-29

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada

CONTRACT SECURITY REQUIREMENTS– PROTECTED B

## 1. INTRODUCTION

This document outlines the IT Security requirements that the Contractor must meet prior to the processing of sensitive data up to and including the level of *Protected B.* In absence of a formal Threat-Risk Assessment (TRA) and due to the IT portion of the Security clearance being contract specific, the intent of this document is to state the minimum safeguards required by the Contractor in order that the processing of sensitive information be approved by the Public Works and Government Services Canada's Canadian Industrial Security Directorate (CISD).

Security is based upon layers of protection; that is, in order for the requirements of the IT Security (ITS) to effectively safeguard the information, they must be preceded and supported by other aspects of security and the associated policies. The physical, personnel and information security safeguards in accordance with the Policy on Government Security and ITS related Standards must exist *prior* to the implementation of ITS safeguards.

## 2. MANDATORY PREREQUISITES

### 2.1 PWGSC Validation for Physical Security

The application of the security safeguards listed in this document is based on the *mandatory requirement* that the physical premises have been inspected by the CISD, PWGSC. The Departmental Security Officer's (DSO) office will validate the certification and notify the IT Security Coordinator.

### 2.2 Personnel Security

All personnel who have access to the material being processed must hold valid Government of Canada security clearance at the appropriate level (dictated by the sensitivity of the material) and have the *"need to know".*

All Contractor personnel handling Government of Canada sensitive information must attend a training/briefing session coordinated and delivered by the Treasury Board Secretariat DSO, IT Security Coordinator.

### 2.3 Authorization and Access Control

The Contractor must provide the Treasury Board Secretariat IT Security Coordinator with a list of all individuals who have access to the sensitive information being processed for the Department, along with Contractor current policies and procedures for adding individuals to the environment and the process followed when an individual is removed from the environment.

In following the 'principle of least-privilege', Contractor must provide only the minimum access required for individuals to perform their duties.

### 2.4 Information Security

All hard copy documents and other media formats must be handled and transported in accordance with Government of Canada guidelines. All hard copy documents and other media will be marked with the appropriate security classification as provided by Treasury Board Secretariat. Any covering letter, transmittal form or circulation slip will be marked to indicate the highest level of classification of the attachments.

Transportation of information associated with this Contract into or out of the physical premises must adhere to RCMP G1-009 *"Transport and Transmittal of Protected and Classified Information".*

Contractor personnel may only transport documents associated with this Contract into or out of the WPS Protected B physical domain with the approval of the Treasury Board Secretariat's DSO.

### 2.5 Security Policy Compliance Monitoring

## 3. MINIMUM SECURITY REQUIREMENTS (DETAILS)

### 3.1 Physical Security

Company must provide and/or demonstrate proof of:

- Brief description of the organization's role and facility
- Signed Company Security Orders
- Material control log for Protected information and assets
- Visitor control log for Protected information and assets
- Detailed signed floor plan identifying the reception zone and the operation zone; plan must include all entries (doors and windows) and the location of all equipment being used to produce, store, destroy and/or transmit data
- Pictures of zones, doors, windows, cabinet, shredder and IT equipment
- RCMP approved containers for storing information at the protected A and B levels
- RCMP approved destruction equipment, or the name of a shredding company that is cleared to the appropriate level
- An appropriately security cleared cleaning organization, or cleaning done under supervision during regular working hours

### 3.2 Personnel Security

- All individuals must hold a valid reliability status or higher
- The maintenance of this status is required for the duration of the contract

### 3.3 IT Security

- Any loss or theft of PROTECTED information must be reported by the Contractor to the Project Authority within 2 hours of detection.
- Any computers used to store and/or process PROTECTED information shall be located in a space that meets the requirements of an Operations Zone as defined in the Treasury Board 's Operational Security Standard on Physical Security.
- If PROTECTED information is stored or processed on portable storage devices such as USB flash drives, the information must be protected by a strong password and encrypted using a product that meets Government of Canada (GC) encryption standards as defined in ITSA-11E CSEC Approved Cryptographic Algorithms for the Protection of Sensitive Information and for Electronic Authentication and Authorization Applications within GC.
- When sending PROTECTED B information electronically via email or other electronic exchange, it must be protected by a strong password and encrypted using a product or service that meets GC encryption standards as defined in ITSA-11E CSEC Approved Cryptographic Algorithms for the Protection of Sensitive Information and for Electronic Authentication and Authorization Applications within GC.
- All PROTECTED information in the Contractor's custody shall be stored on physical computers

and storage media in their custody and located in Canada only. The use of third-party cloud services (e.g. Google Drive, Dropbox) to store PROTECTED information is prohibited.

- On all computers used to store and/or process PROTECTED information:
  - o Current antivirus software must be installed and maintained with the most current virus definitions and signatures;
  - o Operating System (OS) must be a vendor-supported OS (i.e. current security patches must still be available and the product not have reached end of life) and the most recent OS and application security patches must be installed and updated with the most current version;
  - o Access to the information must be restricted by requiring a unique user account ID and strong password for each user who will access the information or use the computer on which it sits;
  - o Computer accounts must not be shared.
  - o A password protected screen saver set to 15 minutes or less must be enabled; and,
- All computers used to store and/or process PROTECTED information, which are also connected to the Internet, should reside behind a network router that is securely-configured using industry best practices (e.g. NAT-enabled firewall, password-protected and documented configuration, security logging enabled, maintained and reviewed, filtered access).
- Security event logging must be enabled and logs kept for a minimum of 90 days.
- If there is a requirement to service a computer that is used to store and/or process PROTECTED information outside of the Contractor's premises, any hard disk(s) containing PROTECTED information must be removed and secured with the Contractor prior to the computer being removed from the premises.
- If it has been determined that a computer hard disk used to store and/or process PROTECTED information is no longer serviceable, the hard disk must be surrendered to the Project Authority for destruction.
- When devices such as a computer hard drives, portable hard drives, USB storage drives and any other devices used to store/process PROTECTED information are no longer required to store/process the infom1ation, the information must be securely deleted and the remaining free space on the device securely wiped, in accordance with industry best practices
- When PROTECTED information is being displayed on a computer screen or being viewed in printed format, it must not be viewable by unauthorized persons.
- If remote access to the contractor's Information System (i.e. computers & storage devices) and the PROTECTED information contained therein is required, the remote access configuration must be securely-configured using industry best practices (e.g. enc1ypted connection, two-factor authentication, security logging, no split tunneling, access control lists, remote access software provided by Contractor to employee).
- Any employees using the remote access must also meet all requirements listed in this document with regards to their remote location and equipment used there.

**ANNEX "E" to PART 3 OF THE BID SOLICITATION – ELECTRONIC PAYMENT INSTRUMENTS**

## ELECTRONIC PAYMENT INSTRUMENTS

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

( ) Direct Deposit (Domestic and International);

## ANNEX "F" to PART 5 OF THE BID SOLICITATION
## FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

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

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

Complete both A and B.

A. Check only one of the following:

( ) A1. The Bidder certifies having no work force in Canada.

( ) A2. The Bidder certifies being a public sector employer.

( ) A3. The Bidder certifies being a federally regulated employer being subject to the Employment Equity Act.

( ) A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.

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

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

**OR**

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

B. Check only one of the following:

( ) B1. The Bidder is not a Joint Venture.

**OR**

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

**ANNEX "G"**
**POLITICAL NEUTRALITY CERTIFICATION**

**Political Neutrality Certification**

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

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

________________________________ ________________________
Signature Date

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

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

## ANNEX “I”
## RFP SUBMISSION FORM / SUBCONTRACTOR INFORMATION

*Please see Word Document labelled “Annex I – RFP Submission Form” and available for download on buyandsell.gc.ca*