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TITLE: SURVEY FOR THE EVALUATION OF THE TAKE-UP OF THE GUARANTEED INCOME SUPPLEMENT

PART 1 - GENERAL INFORMATION

1. Introduction

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

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

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

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

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

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security Requirement: 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 Security Requirements Checklist and the Task Authorization Form.

2. Summary

- (i) For the purpose of allowing the Contractor to perform the work under the contract, Employment and Social Development Canada (ESDC) shall make available to the Contractor the names, contact information, gender, age, and Old Age Security (OAS) recipient status of Canadians aged 65 or older (as of January 1, 2017) who do not file income taxes and who are potentially eligible for the Guaranteed Income Supplement (GIS);
- (ii) The period of the contract is from the date the contract is award to May 1, 2019, inclusive;
- (iii) There is a security requirement associated with this requirement. For additional information, consult Part 6 - Security Requirement, and Part 7 - Resulting Contract Clauses; and
- (iv) The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the Canadian Free Trade Agreement (CFTA), Canada-Chile Free Trade Agreement (CCFTA), Canada-Colombia Free Trade Agreement (CCFTA), Canada-Honduras Free Trade Agreement (CHFTA), Canada-Korea Free Trade Agreement (CKFTA) and Canada-Panama Free Trade Agreement (CPFTA).

3. Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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

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

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

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

2. Submission of Bids

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

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

3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 10 calendar days before the bid closing date. Enquiries received after that time may not be answered.

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



4. Applicable Laws

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

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

5. Basis for Canada's Ownership of Intellectual Property

ESDC has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: 4.1 to generate knowledge and information for public dissemination.



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

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

Section I: Technical Bid 1 soft copy via e-mail to nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section II: Financial Bid 1 soft copy via e-mail to nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section III: Certifications 1 soft copy to nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section IV: Additional Information 1 soft copy to nc-solicitations-gd@hrsdc-rhdcc.gc.ca

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

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

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

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.

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

Section II: Financial Bid

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

Section III: Certifications

Bidders must submit the certifications required under Part 5.



Section IV: Additional Information

1.1 Bidder's Proposed Site or Premises Requiring Safeguard Measures

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

Address:

Street Number / Street Name, Unit / Suite / Apartment Number

City, Province, Territory / State

Postal Code / Zip Code

Country



ATTACHMENT 1 TO PART 3 Pricing Schedule

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

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

The Contractor will be paid in accordance with the following milestones/deliverables:

Deliverable	Completion Date	Payment (%)	Firm Price
1. Completed Methodology and Questionnaire	4 weeks after contract is signed	20%	
2. Non-Response and Potential Biases Report	20 weeks after contract is signed	20%	
3. Draft of Synthesis Report	28 weeks after contract is signed	20%	
4. Final Synthesis Report	36 weeks after contract signed	20%	
5. Submission of Survey Database	36 weeks after contract is signed	20%	
TOTAL			



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

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

1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Attachment 1 to Part 4.

1.2 Financial Evaluation

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

2. Basis of Selection

2.1 Basis of Selection - Highest Combined Rating of Technical (90%) and Price (10%)

- 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 42 points overall for the technical evaluation criteria which are subject to point rating.
The rating is performed on a scale of 60 points.
- 2. Bids not meeting (a) or (b) or (c) or (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 90% for the technical merit and 10% 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 90%.
- 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 10%.
- 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.
- 8. Tie Breaker: When two or more responsive proposals achieve the identical score, the proposal with the highest score in the Rated Criteria will be recommended for contract award.



The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 90/10 ratio of technical merit and price, respectively. The total available points for technical score equal 135 and for price, 45 points, based on the lowest evaluated price of \$45,000.

Basis of Selection - Highest Combined Rating Technical Merit (90%) and Price (10%)

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 90 = 76.66$	$89/135 \times 90 = 59.33$	$92/135 \times 90 = 61.33$
	Pricing Score	$45/55 \times 10 = 8.18$	$45/50 \times 10 = 9.00$	$45/45 \times 10 = 10.00$
Combined Rating		84.84	68.33	71.33
Overall Rating		1st	3rd	2nd



Attachment 1 to Part 4 Evaluation Criteria

EVALUATION PROCESS

MANDATORY REQUIREMENTS

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

Proposals must demonstrate compliance with all of the following specifications and requirements and **MUST** provide the necessary documentation to support compliance in order to be considered.

Number	Mandatory Technical Criteria	Met/Not Met	Cross Reference to Proposal
M1	<p>Proposed Bidder – Work Experience</p> <p>The bidder must include with their proposal detailed resumes for the team members named in their Proposal.</p>		
M2	<p>Proposed Bidder – Experience Doing Surveys</p> <p>The bidder must provide a list and short description of studies that provide evidence of experience with surveys of a similar nature and complexity (including, but not limited to, surveys of vulnerable populations, seniors, and persons with disabilities). The bidder must have at least five (5) years of experience conducting surveys of this nature.</p>		
M3	<p>Proposed Bidder – Project Experience</p> <p>The bidder must include two (2) written project summaries. Acceptable projects could include such subjects as financial stability, challenges faced by vulnerable populations, or other related social science research.</p> <p>Project summaries must include, as a minimum:</p> <ul style="list-style-type: none"> a) The full legal name and a brief description of the client organization; b) The dates/duration of the project; c) A brief description of the project, including scope, deliverables, objectives to be achieved, issues, intent and the results/outcomes of the work; and d) The extent of the proposed resources' involvement in the project. 		



POINT RATED

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

A. Bidder's demonstrated understanding of the Guaranteed Income Supplement (GIS) and its goals and scope by describing such elements as the purpose and history of the program as well as which groups the program targets.	MAX Points	Score	Reference
<ul style="list-style-type: none"> - Knowledge and understanding of the GIS, including its purpose, how it is structured, and how it provides income support to Canadians (up to 5 pts) <ul style="list-style-type: none"> o less than satisfactory (1 pt) o satisfactory (3 pts) o more than satisfactory (5 pts) - Knowledge and understanding of the barriers faced by eligible Canadians (including subpopulations such as indigenous, women, the homeless or near homeless, and immigrants) with regard to applying for and receiving the GIS. (up to 5 pts) by describing these barriers. <ul style="list-style-type: none"> o less than satisfactory (1 pt) o satisfactory (3 pts) o more than satisfactory (5 pts) 	10		
<ul style="list-style-type: none"> - Recognition of potential challenges of conducting surveys with hard-to-reach populations by listing at least one (1) possible methodological challenge that would affect the validity and reliability of the data collected. For each challenge identified, provide a mitigation strategy. (up to 10 pts) <ul style="list-style-type: none"> o less than satisfactory (3 pts) o satisfactory (6 pts) o more than satisfactory (10 pts) o 	10		
<p>Pass mark (Part A): 14 out of 20 points</p>	20		
B. Proposed Execution of Evaluation			
<ul style="list-style-type: none"> - Methodology <ul style="list-style-type: none"> - The proposed bidder should demonstrate a clear explanation of how evaluation questions will be addressed with proposed methodology (up to 10 pts) <ul style="list-style-type: none"> o very little understanding (3 pts) o good understanding of method but does not relate well to evaluation questions (6 pts) o strong understanding of method and strong links to evaluation questions (10 pts) - The proposed bidder should demonstrate the detail of methodology that will be used (up to 10 pts), including the sampling design, data collection procedures, and the questionnaire construction. <ul style="list-style-type: none"> o less than satisfactory (3 pts) o satisfactory (6 pts) 	20		



o more than satisfactory (10 pts)			
- Work plan and time schedule	10		
- The proposed resource(s) should provide a detailed work plan, clearly indicating steps to be taken from start to end (up to 5 pts)			
o less than satisfactory (1 pt)			
o satisfactory (3 pts)			
o more than satisfactory (5 pts)			
- The proposed resource(s) should provide a detailed time schedule that meets timeframes identified in Statement of Work (up to 5 pts)			
o less than satisfactory (1 pt)			
o satisfactory (3 pts)			
o more than satisfactory (5 pts)			
-			
Pass mark (Part B): 21 out of 30 points	30		
C: Organizational Management and Expertise			
- Capacity of Contractor to undertake surveys (based on previous similar work conducted)	20		
- Provide examples of previous work that demonstrate ability to obtain high response rates of 30% to 50%(up to 10 pts)			
o less than satisfactory (3 pts)			
o satisfactory (6 pts)			
o more than satisfactory (10 pts)			
- Provide examples of previous work that demonstrate ability to coordinate surveys and deliver on time (up to 5 pts)			
o less than satisfactory (1 pt)			
o satisfactory (3 pt)			
o more than satisfactory (5 pts)			
- Provide at least one (1) example previous work that demonstrates ability to write clear and logical reports (up to 5 pts)			
o less than satisfactory (1 pt)			
o satisfactory (3 pts)			
o more than satisfactory (5 pts)			
- Capabilities of Project Lead in managing surveys	10		
- Demonstrated strength in organizing and planning surveys of a similar nature and complexity over last 10 years (up to 10 pts)			
o less than satisfactory (3 pts)			
o satisfactory (6 pts)			
o more than satisfactory (10 pts)			
Pass mark (Part C): 21 out of 30 points	30		
Pass mark (Total): 42 out of 60 points	60		



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

1. Mandatory Certifications Precedent to Contract Award

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

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

1.1 Declaration of Convicted Offences

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

Integrity Provisions – List of Names

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

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

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

1.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Human Resources and Social Development Canada \(ESDC\) - Labour's](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) website

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list at the time of contract award.

1.3 Former Public Servant Certification

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the



Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.
- e. "lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.
- f. "pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c.P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c.S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c.C-17, the [Defence Services Pension Continuation Act](#), 1970, c.D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c.R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c.R-11, the [Members of Parliament Retiring Allowances Act](#), R.S., 1985, c.M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c.C-8.

Former Public Servant in Receipt of a Pension

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

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

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

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

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

Work Force Adjustment Directive

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



If so, the Bidder must provide the following information:

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

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

1.4 Status and Availability of Resources

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

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

1.5 Education and Experience

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.



PART 6 – SECURITY REQUIREMENT

1. Security Requirement

1. At the date of bid closing, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirement 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 or document safeguarding must meet the security requirement as indicated in Part 7 - Resulting Contract Clauses;
 - (e) the Bidder must provide the address(es) of proposed location(s) of work performance or document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.



PART 7 - RESULTING CONTRACT CLAUSES

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

1. Applicable Laws

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

2. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the General Conditions 2035 - Higher Complexity - Services (2016-04-04);
- (c) the Supplemental General Conditions 4007 – Canada to Own Intellectual Property Rights in Foreground Information (2010-08-16);
- (d) Annex "A", Statement of Work;
- (e) Annex "B", Security Requirements Check List;
- (f) Annex "C" Task Authorizations; and
- (g) the Contractor's bid dated _____, (*insert date of bid, if the Contractor has submitted a proposal*)

3. Statement of Work

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

3.1 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

3.1.1 Task Authorization Process:

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex C.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis and method of payment as specified in the Contract.
3. The Contractor must provide the Project Authority within 10 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Contracting Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.



3.1.2 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,

"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and

"Minimum Contract Value" means 5%.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.
4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

4. Standard Clauses and Conditions

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

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

4.1 General Conditions

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

- 4.1.1 Delete reference to 'Client Reference Number (CRN)' and 'Procurement Business Number (PBN)' from Section 12, sub-section 2.a
- 4.1.2 Delete sub-sections 14
- 4.1.3 Delete sub-sections 15
- 4.1.4 Delete sub-sections 19
- 4.1.5 Delete sub-sections 20

5. Security Requirement

- 5.1 The following security requirement (SRCL and related clauses provided by the [Contract Security Program](#) apply and form part of the Contract:

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



- 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 Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
- The contractor will use only the Departmental approved way of transmission (by encrypted email, DVD, secure FTP sites, Departmental approved USB key etc.) to submit the deliverables.
- All IT media storing information concerning this contract including any backups made of the contract data, at the completion of this contract are subject to the IT Security Guidance (ITSG) 06 – Clearing and Declassifying Electronic Data Storage Devices.
- 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 up to the level of **PROTECTED B**.
- Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
- The Contractor/Offeror must comply with the provisions of the:
a) Security Requirements Check List and security guide (if applicable), attached at Annex B;
b) *Industrial Security Manual* (Latest Edition).

5.2 Contractor's Site or Premises Requiring Safeguard Measures

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

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

6. Period of the Contract

The period of the Contract is from contract award to May 1, 2019 inclusive.

7. Authorities

7.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Melissa Bechamp Title: Senior Procurement Officer
Employment and Social Development Canada
Procurement and Contracting

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



7.2 Project Authority

The Project Authority for the Contract is:

To be provided at time of Contract award

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

7.3 Contractor's Representative

The Contractor's Representative for the Contract is:

To be provided at time of Contract award

8. Payment

8.1 Basis of Payment – Limitation of Expenditure – Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ _____. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.
4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

8.2.1 Limitation of Expenditure – Task Authorizations

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment in 8.1, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.



No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

9. Method of Payment

9.1 Milestone Payments

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

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

9.2 Schedule of Milestones

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

Deliverable	Completion Date	Payment (%)	Firm Price
1. Completed Methodology and Questionnaire	4 weeks after contract is signed	20%	
2. Non-Response and Potential Biases Report	20 weeks after contract is signed	20%	
3. Draft of Synthesis Report	28 weeks after contract is signed	20%	
4. Final Synthesis Report	36 weeks after contract signed	20%	
5. Submission of Survey Database	36 weeks after contract is signed	20%	
Sub-Total			
Applicable Taxes			
TOTAL			

10. Invoice Submission

- 1. Invoices must be submitted in the Contractor's name, either by mail to the address on the cover page or by e-mail to the Project Authority (see article 7.2). The Contractor must submit invoices for each delivery or shipment; invoices must only apply to the Contract. Each invoice must indicate whether it covers partial or final delivery.
- 2. Invoices must show:
 - a. the date, the name and address of the client department, item or reference numbers, deliverable/description of the Work, contract number, and financial code(s);
 - b. details of expenditures (such as item, quantity, unit of issue, unit price, fixed time labour rates and level of effort, subcontracts, as applicable) in accordance with the Basis of Payment, exclusive of Applicable Taxes;



- c. deduction for holdback, if applicable;
 - d. the extension of the totals, if applicable; and
 - e. if applicable, the method of shipment together with date, case numbers and part or reference numbers, shipment charges and any other additional charges.
3. Applicable Taxes must be specified on all invoices as a separate item along with corresponding registration numbers from the tax authorities. All items that are zero-rated, exempt or to which Applicable Taxes do not apply, must be identified as such on all invoices.
 4. By submitting an invoice, the Contractor certifies that the invoice is consistent with the Work delivered and is in accordance with the Contract.

10.1. T1204 Information Reporting by Contractor

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

11. Foreign Nationals (Canadian Contractor)

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

12. Proactive Disclosure of Contracts with Former Public Servants

Remark to Contracting Authority: Insert the following clause if the Contractor is a FPS in receipt of a PSSA pension.

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

13. Certifications

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



14. Intellectual Property

Canada to Own Intellectual Property Rights in Foreground Information

- **01** Interpretation
- **02** Disclosure of Foreground Information
- **03** Canada to Own Intellectual Property Rights in Foreground Information
- **04** License to Intellectual Property Rights in Background Information
- **05** Right to License
- **06** Access to Information; Exception to Contractor Rights
- **07** Waiver of Moral Rights

- Copyright (Re: 6.5)

01 Interpretation

1. In the Contract,

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

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

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

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

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

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

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



02 Disclosure of Foreground Information

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

03 Canada to Own Intellectual Property Rights in Foreground Information

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

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

or

(c) SA MAJESTÉ LA REINE DU CHEF DU CANADA (year)

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

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

4. The Contractor shall execute such conveyances or other documents relating to the Intellectual Property Rights in the Foreground Information as the Minister may require, and the Contractor shall, at Canada's expense, afford the Minister all reasonable assistance in the preparation of applications and in the prosecution of any applications for registration of any Intellectual Property Right in any jurisdiction, including without limitation the assistance of the inventor in the case of Inventions.

04 License to Intellectual Property Rights in Background Information

1. The Contractor hereby grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in any Background Information



incorporated into the Work or necessary for the performance of the Work as may be required for the following purposes:

1. for the use, operation, maintenance, repair or overhaul of the Work;
2. in the manufacturing of spare parts for maintenance, repair or overhaul of any custom part of the Work by Canada if those parts are not reasonably available to enable timely maintenance, repair or overhaul;
3. for disclosure to any contractor engaged by Canada (or bidder for such a contract) to be used solely for a purpose set out in paragraph (a) or (b), but only if the Contractor is unable or unwilling to carry out the maintenance, repair or overhaul or provide the spare parts on reasonable commercial terms and within reasonable delivery times;

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

2. The Contractor hereby further grants to Canada a non-exclusive, perpetual, irrevocable, world-wide, fully-paid and royalty-free license to exercise such of the Intellectual Property Rights in the Background Information incorporated into the Work or necessary for the performance of the Work as are necessary in order for Canada to modify, improve or further develop the Foreground Information. Canada's rights under this subsection 2 shall not include the right to reproduce the whole or part of any deliverable under the Contract that does not incorporate Foreground Information, save that Canada may reproduce any drawings, plans, designs, or other Background Information that are subject to copyright or industrial design protection, for purposes of modification, improvement or further development of the Foreground Information by or for Canada. The Contractor agrees to make any such Background Information (including, in the case of Software, source code) promptly available to Canada for any such purpose.
3. Notwithstanding subsections 1 and 2, the license set out therein shall not apply to any Software that is subject to detailed license conditions that are set out elsewhere in the Contract.
4. The Contractor acknowledges that, subject to paragraph (c) of subsection 1, Canada may wish to award contracts for any of the purposes contemplated in subsections 1 and 2 and that such contract awards may follow a competitive process. The Contractor agrees that Canada's license in relation to the Intellectual Property Rights in Background Information includes the right to disclose the Background Information to bidders for such contracts, and to sub-license or otherwise authorize the use of that information by any contractor engaged by Canada solely for the purpose of carrying out such a contract. Canada shall require bidders and the contractor not to use or disclose any Background Information except as may be necessary to bid for or to carry out that contract.
5. Where the Intellectual Property Rights in any Background Information are owned by a Subcontractor at any tier, the Contractor shall either obtain a license from that Subcontractor that permits compliance with subsections 1 and 2 or arrange for the Subcontractor to convey directly to Canada the same rights by execution of the form provided for that purpose by the Minister, in which case the Contractor shall deliver that form to the Minister, duly completed and executed by the Subcontractor, no later than the time of disclosure to Canada of that Background Information.

05 Right to License

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

06 Access to Information; Exception to Contractor Rights

1. Subject to the Access to Information Act, R.S.C., c. A-1 and to any right of Canada under the Contract, Canada shall not release or disclose outside the Government of Canada any Background Information delivered to Canada under the Contract that is confidential information or a trade secret of the Contractor or a Subcontractor.



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

07 Waiver of Moral Rights

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

Copyright (Re: 6.5)

Copyright

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

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

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

or

(c) SA MAJESTÉ LA REINE DU CHEF DU CANADA(year)
3. At the completion of the Contract, or at such other time as the Contract or the Minister may require, the Contractor shall fully and promptly disclose to the Minister all Material created or developed under the Contract.
4. Where copyright in any Material vests in Canada under the Contract, the Contractor shall execute such conveyances and other documents relating to title or copyright as the Minister may require.
5. The Contractor shall not use, copy, divulge or publish any Material except as is necessary to perform the Contract.



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6. At the request of the Minister, the Contractor shall provide to Canada, at the completion of the Work or at such other time as the Minister may require, a written permanent waiver of Moral Rights, in a form acceptable to the Minister, from every author that contributed to the Material.
7. If the Contractor is an author of the Material, the Contractor hereby permanently waives the Contractor's Moral Rights in respect of the Material.



ANNEX “A” STATEMENT OF WORK

1.0 TITLE

Survey for the Evaluation of the Take-Up of the Guaranteed Income Supplement

2.0 OBJECTIVE

The Contractor will be required to conduct a survey with approximately 1,000 individuals aged 65 or over (as of January 1, 2017) who: (1) do not file income taxes; (2) are not in receipt of the Guaranteed Income Supplement (GIS); and (3) are eligible for the GIS. The purpose of the survey will be to gather information on reasons why some Canadian seniors who may be eligible for GIS benefits do not receive them. The survey will be conducted by telephone and will have an average expected duration of approximately 10-15 minutes. The purpose of the survey will be to enrich the information collected from other sources in order to address the relevant evaluation questions.

3.0 BACKGROUND

The GIS is a monthly benefit that provides additional income to low-income seniors in receipt of the Old Age Security (OAS) pension. Its objective is to ensure, together with the OAS pension, a basic minimum level of income for seniors with little or no other income.

Guaranteed Income Supplement take-up has remained a top priority since 2001, when a Parliamentary committee recommended that work continue in identifying and contacting elderly persons who might be eligible for the GIS.¹ The 2012 evaluation of the OAS program found that take-up increased from 75% to 87% over the 1996 to 2006 period.² Despite this increase, a significant number of eligible Canadian seniors remain without this benefit (based on 2006 data of 1,587,301 GIS recipients and a take-up rate of 87%, this implies that there were 237,182 GIS-eligible non-recipients in 2006). Given this gap between those eligible to receive the benefit and those in receipt, this evaluation focuses on continuing to examine take-up and barriers to take-up since the last evaluation period ending in 2006. The question of whether results (e.g. the GIS impact on reducing poverty) line up with program objectives (ensuring a minimum level of income for seniors) has been extensively researched and evidence has already established that this is the case. For this reason, identifying ways to increase GIS take-up will contribute to improving program results and reduce poverty among seniors.

An evaluation plan with two phases has been developed, with a focus on examining how GIS take-up has changed since the 2010 GIS take-up evaluation (which reported take-up rates up to 2006), barriers among GIS-eligible seniors, and the effectiveness of efforts being made to increase take-up. Phase 2 includes a number of lines of evidence, of which this survey is one line of evidence.

4.0 EVALUATION QUESTIONS

The survey to be conducted will provide evidence to address specific questions from the Evaluation Framework for the Evaluation of the Take-Up of the GIS. In consultation with the Project Authority, the Contractor will design a survey questionnaire, which is expected to be properly designed to help collect evidence on the following evaluation questions:

¹ In December 2001, the House of Commons Standing Committee on Human Resources Development and the Status of Persons with Disabilities published a report titled “The Guaranteed Income Supplement: The Duty to Reach All”. In that report, the Committee recommended that Human Resources Development Canada and the Canada Customs and Revenue Agency continue to work together to identify and directly contact elderly persons who might be eligible for the GIS.

² The evaluation report is available at <http://www12.edsc.gc.ca/sgpe-pmps/p.5bd.2t.1.3ls@-eng.jsp?pid=6655>.



1. Have the barriers to take-up among GIS-eligible seniors changed since the previous GIS take-up evaluation?
2. Which barriers are common to all and which barriers are specific to certain vulnerable populations (e.g. immigrants, indigenous people, those living in remote communities, etc.)?
3. How effective were actions taken to reach different groups?
4. What was the impact (e.g. on take-up, awareness, understanding, etc.) of the different measures?

5.0 SCOPE

The Contractor will be required to conduct a telephone survey of about 10-15 minutes in length with roughly 1,000 individuals who are eligible for the GIS who do not file income tax. A sample of 4,000 individuals will be derived from a database containing linked Social Insurance Registry (SIR), OAS and Canada Revenue Agency (CRA) T1 data, with an additional linkage to the Canada Pension Plan (CPP) administrative data to determine contact information. The survey will attempt to determine the reasons why some individuals are not receiving the GIS benefit.

The Contractor (in consultation with the Project Authority) will develop the telephone survey questionnaires to cover the issues to be examined, recruit the participants, provide an experienced bilingual interviewer or a team of experienced interviewers (at least one experienced English-speaking interviewer and at least one experienced French-speaking interviewer), and the necessary material to successfully complete the project. The work of the Contractor is expected to be completed by July 31, 2018.

6.0 TASKS/TECHNICAL SPECIFICATIONS

Task 1: Meet with Project Authority and Plan Survey

The Contractor will meet with the Project Authority (and possibly with other ESDC evaluation officers) in order to plan the approach for this project. The Contractor will be expected to be in regular contact with the Project Authority for the duration of the project through weekly communication via telephone or e-mail in order to report on the progress of the project.

The selected Contractor will be responsible for:

- Providing a detailed methodology report;
- Developing a recruitment plan and invitation procedures for potential survey respondents (based on the list of prospective participants to be provided by ESDC);
- Writing the questions and creating the questionnaires in consultation with ESDC;
- Identifying and providing the personnel and staffing resources for all tasks;
- Identifying the appropriate composition for potential respondents (e.g. by region, gender, age, etc.);
- Developing eligibility and exclusion criteria; and
- Confirming the timeline to ensure that the final report for the survey will be completed by July 31, 2018.

The Contractor will develop the questionnaires for the survey in partnership with the Project Authority. The questionnaires will be developed to be fully consistent with ESDC's Guidelines for Conducting Surveys.

Along with the methodology report and questionnaires, the Contractor will develop a detailed recruitment plan. The recruitment plan will include an introductory statement indicating that the Contractor is working on behalf of ESDC. The recruitment plan will also include asking a few screening questions to ensure that a potential survey participant is eligible for the GIS.

Task 2: Recruit Potential Survey Participants and Conduct Survey

The selected Contractor will not proceed to the second task until ESDC has approved the methodology report, recruitment plan and questionnaires. The Contractor will be responsible for the recruitment of the survey participants. The specific tasks to be undertaken include the following:



- Recruiting potential survey participants:
 - Informing the potential participant that he or she is a consultant hired by ESDC to carry out the survey;
 - Informing the potential participant of the reasons for the phone call and/or letter and the objectives of the survey;
 - Explaining to the potential participant that all responses will remain anonymous, informing the interviewee that their participation is voluntary, and explaining his/her right of access under the *Privacy Act* and *Access to Information Act*; and
 - Informing the potential participant of the length of the recruitment plan and the future survey.
- Selecting enough potential participants to ensure that approximately 1,000 completed survey responses are obtained.
- Asking the potential participants about the preferred contact time for the survey interview.
- Providing a short analysis identifying non-response problems and any potential biases that may result.

Once the recruiting process is completed, the selected Contractor will be responsible for selecting and employing a skilled bilingual interviewer or a team of experienced interviewers. The specific tasks necessary will include:

- Designing the analysis plan.
- Setting the dates and time for the survey interviews.
- Determining and making the follow-up procedures that will ensure participation by making a follow-up telephone call or sending a letter via mail or e-mail (whichever method the Contractor deems to be the most appropriate method for ensuring a high participation rate) pertaining to the date and time of the survey. The phone call/letter/e-mail will explain:
 - The purpose of the survey;
 - The purpose of the data collection;
 - Who will be conducting the data collection;
 - The approximate length of the survey to which their participation is requested;
 - That participation in the survey is voluntary, that no administrative decision about the individual will be made, and that their refusal to participate in the data collection method requested will not impact on services they receive or could receive from ESDC in the future;
 - The legislative authority to collect their personal information and how it will be administered;
 - Their access to information and privacy rights; and
 - That if the individual does not agree to participation in the survey, the Contractor shall not conduct data collection and shall mark the record for non-response in the working file. These records will be maintained until the end of the contract by the Contractor, at which time these records will be purged by the Contractor.
- Contacting the potential survey participants.
- Conducting the survey.

Potential survey participants will first be asked to confirm their willingness to participate. After receiving confirmation, an experienced interviewer will conduct the survey interviews. It is preferable that a limited number of interviewers conduct the survey.

The selected Contractor will be responsible for collecting the information obtained during the survey. The survey will be conducted in accordance with ESDC's policies regarding security and privacy. The survey will have an expected average duration of approximately 10-15 minutes.

Before conducting the survey, the Contractor will again inform the participant:

- That the consultant was hired by ESDC to carry out the survey;
- Of the reasons for why the survey is taking place and of its objectives;
- That all responses will be anonymous, informing the survey participant that the survey is voluntary and explaining his/her right of access under the *Privacy Act* and *Access to Information Act*;
- Of the length of the survey;
- That their consent is required before conducting the survey; and



- That personal information will be protected throughout the process.

Audio Taping of Survey

The Contractor may record survey phone calls in order to capture all facets of the discussion, in which case the Contractor will inform the survey participant. The survey participant will also be informed that the audio tape will be kept in a secure location by the consulting firm, and that the data will be retained only for a specified period of time (as required by law and applicable federal policies), and will subsequently be destroyed by the Contractor and not returned to ESDC. Further, in any reporting, no survey participant will be identified.

Task 3: Prepare Preliminary Draft Report

The selected Contractor will be responsible for preparing a synthesis preliminary draft report of the survey, highlighting the main issues. The specific tasks to be undertaken will include:

- Organizing the notes, any tapes, transcripts and other information;
- Studying the results to determine the main issues and key conclusions; and
- Preparing a draft of the final report.

The survey will produce a great deal of data that must be sorted, understood, interpreted and summarized. It is essential that no individuals be identified and no specific individual quotes be reported in any synthesis reports which could be reasonably attributed to a specific individual. To ensure that the results and the preliminary draft report are of high quality, the report will go through a peer review.

Task 4: Prepare Final Draft Report and Submit Survey Database

Upon approval of the preliminary draft report, the Contractor will produce a final draft report that incorporates all requested changes made by the Project Authority and the academic peer reviewer. The final synthesis draft report will only contain aggregate information – no individuals will be identified. The selected Contractor will complete and submit the final report to ESDC. The final report will include an Executive Summary and will address all of the evaluation issues and questions. The report should not exceed 50 pages. As well, the selected Contractor must be prepared to meet with ESDC senior management to discuss the results of the survey, if requested.

The selected contractor will also submit a database containing the results of the survey to ESDC. The database provided to ESDC should not contain personal identifiers (i.e. contact information) of the individuals. However, it should assign each individual a sequence number and provide their responses in a survey codebook.

The database should be representative of the underlying population. If this is not the case, the survey data must be weighted accordingly.

If a sub-contractor is hired, the sub-contractor must sign an intellectual property form by which the intellectual property rights are deemed to belong to the Government of Canada. The sub-contractor must meet all ESDC security and privacy conditions prior to any involvement in this project and agree to be bound by all terms and conditions of the principal contract.

7.0 Use, Retention, Disposal of Personal Information Collected for the Contract and Security Requirements

The selected Contractor will sign a contract that will include the following privacy clauses:

1. For the purpose of allowing the Contractor to perform the work under the contract, ESDC shall make available to the Contractor, in accordance with the Department of Employment and Social Development Act and other applicable laws governing the protection of information under its control, the following information about Canadians aged 65 or older (as of January 1, 2017) who do not file income taxes and who are potentially eligible for the GIS:



- Name;
 - Contact Information (home address, home telephone number);
 - OAS recipient status (yes or no);
 - Gender; and
 - Age.
2. For the purpose of performing the work under the contract, the Contractor shall collect, on behalf of ESDC, information such as attitudes and opinions.
 3. The Contractor shall collect the information referred to in section 2 above directly from the individuals to whom that information relates, unless the individuals authorize collection from another source or the direct collection of information might result in the collection of inaccurate information.
 5. The Contractor shall inform the individuals of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
 6. Upon termination of the contract, the contractor must return all equipment including encrypted USB key provided by the Project Authority including all documents produce.
 7. The contractor will use only the Departmental approved way of transmission (by encrypted email, DVD, secure FTP sites, Departmental approved USB key etc.) to submit the deliverables
 8. Ensuring that all GC electronic data at the Protected B, Protected C and classified levels is stored in a GC-approved computing facility located within the geographic boundaries of Canada or within the premises of a GC department located abroad, such as a diplomatic or consular mission. This does not mean that the country of origin of IT service providers must be Canada, as long as these service providers can ensure storage of data within boundaries or premises as described above.
 9. The Contractor shall make every effort to ensure the accuracy of the information collected pursuant to section 2 above.
 10. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor shall not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.
 11. The Contractor shall maintain all information referred to in sections 1 and 2 above, and make sure it is only accessible in Canada.
 12. The Contractor shall segregate all records containing information referred to in sections 1 and 2 above (whether in electronic format or in hard copy) from its other records, and keep all databases in which such records are to be maintained physically independent from all other databases, directly or indirectly, which are located outside Canada.
 13. The Contractor shall ensure that all aspects of the processing of information referred to in sections 1 and 2 above are conducted and only accessible in Canada.
 14. The Contractor shall take all necessary measures to ensure that every person it hires, or the services of whom it retains, to complete its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in sections 1 and 2 above.
 15. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in sections 1 or 2 above, is disclosed to a third party for a purpose authorized herein, unless there is a written agreement between the Contractor and the third party,



imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.

16. The information referred to in sections 1 and 2 above remains at all times under the control of ESDC.
17. The information referred to in sections 1 and 2 above is protected by the *Privacy Act* and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the *ESDC Security Policy and Procedures Manual*, the *Government of Canada Security Policy* or other instructions that ESDC may issue.
18. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in sections 1 and 2 above except with the written consent of ESDC.
19. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall destroy or return to ESDC the information referred to in sections 1 and 2 above and copies thereof, if any.
20. All information shall be destroyed in accordance with the *ESDC Security Policy and Procedures Manual* or other instructions that ESDC may issue.
21. The Contractor's premises shall be open for inspection by authorized representatives of ESDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.
22. The Contractor shall notify ESDC immediately after he/she becomes aware that a breach of any provision of this contract governing the protection of personal information has occurred.
23. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by ESDC.

8.0 DELIVERABLES

A list of project deliverables, deadlines and payment information is provided below.

Deliverable	Completion Date	Payment (%)
1. Completed Methodology and Questionnaire	4 weeks after contract is signed	20%
2. Non-Response and Potential Biases Report	20 weeks after contract is signed	20%
3. Draft of Synthesis Report	28 weeks after contract is signed	20%
4. Final Synthesis Report	36 weeks after contract signed	20%
5. Submission of Survey Database	36 weeks after contract is signed	20%

The detailed methodology and work plan, questionnaire, and synthesis report will be supplied to ESDC in Microsoft Word electronic file format. All supporting data tables and charts (if applicable) that go into the reports will also be supplied in Microsoft Excel file format.

The research and write-up of the reports will be considered completed and satisfactory only with the approval of the ESDC Project Authority. The Contractor will be responsible for incorporating all relevant suggestions into the reports. The reports will be judged in terms of the quality of writing, the necessary supporting evidence and the quality of the research effort.



ANNEX "B" Security Requirements Check List



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité Protected B

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 ESDC	2. Branch or Directorate / Direction générale ou Direction SSPB/Evaluation	
3. a) Subcontract Number / Numéro du contrat de sous-traitance To be determined	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant To be determined	
4. Brief Description of Work / Brève description du travail The Contractor will conduct a telephone survey of those who are eligible for the Guaranteed Income Supplement (GIS) who do not file income tax, requiring a sample of approximately 4,000 individuals to ensure that approximately 1,000 survey responses are obtained. The sample of 4,000 individuals will be derived from a database containing Linked Social Insurance Registry (SIR), Old Age Security (OAS) and Canada Revenue Agency (CRA) T1 data, with an additional linkage to the Canada Pension Plan (CPP) administrative data to determine contact information. The survey will attempt to determine the reasons why some individuals are not receiving the GIS benefit. The contractor will be required to have the appropriate security clearances and follow approved procedures in order to access any personal information.		
5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? (Specify the level of access using the chart in Question 7. c) / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted / Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à : Specify country(ies) / Préciser le(s) pays : <input type="checkbox"/>	Restricted to: / Limité à : Specify country(ies) / Préciser le(s) pays : <input type="checkbox"/>	Restricted to: / Limité à : Specify country(ies) / Préciser le(s) pays : <input type="checkbox"/>
7. c) Level of Information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



TBS/SCT 350-193(2004/12)

Security Classification / Classification de sécurité
Protected B



Contract Number / Numéro du contrat
Security Classification / Classification de sécurité
Protected B

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: 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? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document:

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

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

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

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

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



Contract Number / Numéro du contrat
Security Classification / Classification de sécurité Protected B

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					CONSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRES SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL	NATO SECRET	CODING TOP SECRET CODAGE TRES SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET	
											A	B	C				CONFIDENTIAL
Information / Accès Renseignements / Biens Production		<input checked="" type="checkbox"/>															
IT Access / Accès TI		<input checked="" type="checkbox"/>															
IT Link / Lien électronique																	

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat
Security Classification / Classification de sécurité Protected B

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Thomas Lang		Title - Titre Senior Advisor	Signature
Telephone No. - N° de téléphone 819-654-3470	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel thomas.lang@hrsdcc-rhdcc.gc.ca	Date August 21, 2017
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Name (print) - Nom (en lettres moulées) DAVID ZORZO RICHARD LANGRIS		Title - Titre Regional Security Officer for NHQ MANAGER	Signature
Telephone No. - N° de téléphone 819-654-1069	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel RICHARD.LANGRIS@HRSDC.RHDCC.GC.CA	Date 29/03/18
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? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui			
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées) Melissa Bechamp		Title - Titre Senior Procurement Specialist	Signature
Telephone No. - N° de téléphone 819-654 5969	Facsimile No. - N° de télécopieur 819-953-6859	E-mail address - Adresse courriel melissa.bechamp@hrsdcc-rhdcc.gc.ca	Date Apr 3, 18
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)		Title - Titre	Signature
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date



**Annex C
Task Authorization Form**

TASK AUTHORIZATION (TA) FORM				
Contractor:		Contract No.		
Task Authorization No.:		Date:		
Financial coding:		Amendment #:		
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)				
<p>Please send invoices to: CFOB – Accounting Operations 200 Rene-Levesque Blvd. West Montreal, QC H2Z 1X4</p> <p>ESDC Procurement Representative: Email: Phone # :</p> <p>The ESDC Contracting Authority (or delegated representative) is responsible for the management of this TA. Any changes to the TA must be authorized in writing by the ESDC Procurement Representative. The Contractor is not to perform work in excess of or outside the scope of this TA based on verbal or written requests or instructions from any government personnel other than the aforementioned officer.</p> <p>The Project Authority: Phone #</p> <p>The Project Authority (or delegated representative) is responsible for all matters concerning the technical content of the Work under this TA. Any proposed changes to the scope of the Work are to be discussed with the Project Authority, but any resulting change is only effective and enforceable if a written contract amendment is issued by the ESDC Procurement Representative or the PWGSC Contracting Authority.</p>				
2. PERIOD OF		FROM (DATE):		To (DATE):
3. WORK LOCATION:				
5. LANGUAGE REQUIREMENTS:				
6. LEVEL OF SECURITY CLEARANCE REQUIRED				
7. COST				
CATEGORY	NAME OF RESOURCE	PER DIEM RATE	ESTIMATED # OF DAYS	TOTAL COST
				\$
	ESTIMATED COST			\$
	QST			\$
	ESTIMATED COST			\$0
	TOTAL TRAVEL & LIVING COST			0.00
	TOTAL			\$



8 SIGNATURES		
Project Authority:	Signature:	Date:
	On File	
Contract Authority: (ESDC)	Signature:	Date:
Check Either Option <input type="checkbox"/> The Contractor hereby accepts this task authorization <input type="checkbox"/> The Contractor does not accept this task authorization <hr/>		
Name of Contractor authorized to sign (type or print):	Title of Contractor authorized to sign (type or print):	Date:
Signature:		