



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

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

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT / DOCUMENT CONTIENT DES
EXIGENCES RELATIVES À LA SÉCURITÉ

Vendor/Firm Name and Address

**Raison sociale et adresse du
fournisseur/de l'entrepreneur**

Issuing Office - Bureau de distribution

Business Management and Consulting Services Division /
Division des services de gestion des affaires et de
consultation
11 Laurier St. / 11, rue Laurier
10C1, Place du Portage
Gatineau, Québec K1A 0S5

Title - Sujet MEMORIAL GRANT PROGRAM	
Solicitation No. - N° de l'invitation 0D160-183745/C	Date 2018-07-10
Client Reference No. - N° de référence du client 0D160-183745	
GETS Reference No. - N° de référence de SEAG PW-\$\$ZG-423-33675	
File No. - N° de dossier 423zg.0D160-183745	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-08-21	Time Zone Fuseau horaire Eastern Daylight Saving Time EDT
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Marcotte, Karen	Buyer Id - Id de l'acheteur 423zg
Telephone No. - N° de téléphone (613) 858-8522 ()	FAX No. - N° de FAX (000) 000-0000
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: PUBLIC SAFETY AND EMERGENCY PREPAREDNESS CANADA 269 LAURIER AVE. W OTTAWA Ontario K1A0P8 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

Solicitation No. - N° de l'invitation
OD160-183745/C
Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.OD160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

PS MEMORIAL GRANT PROGRAM.....	3
PART 1 – GENERAL INFORMATION.....	3
1.1 INTRODUCTION	3
1.2 SUMMARY	3
1.3 DEBRIEFINGS	4
PART 2 – BIDDER INSTRUCTIONS	5
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS	5
2.2 SUBMISSION OF BIDS	5
2.3 FORMER PUBLIC SERVANT.....	5
2.4 ENQUIRIES - BID SOLICITATION	6
2.5 APPLICABLE LAWS	7
2.6 BASIS FOR CANADA’S OWNERSHIP OF INTELLECTUAL PROPERTY	7
2.7 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD.....	7
PART 3 – BID PREPARATION INSTRUCTIONS	8
3.1 BID PREPARATION INSTRUCTIONS	8
SECTION I: TECHNICAL BID.....	10
SECTION II: FINANCIAL BID	10
SECTION III: CERTIFICATIONS.....	10
SECTION IV: ADDITIONAL INFORMATION	11
ATTACHMENT 1 TO PART 3, PRICING SCHEDULE.....	12
PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION	15
4.1 EVALUATION PROCEDURES.....	15
4.1.1 <i>Technical Evaluation</i>	15
4.1.1.1 Joint Venture Experience	15
4.1.1.2 Mandatory Technical Criteria	16
4.1.1.3 Point Rated Technical Criteria	16
4.1.2 <i>Financial Evaluation</i>	16
4.2 BASIS OF SELECTION.....	16
4.2.1 <i>Basis of Selection – Highest Combined Rating of Technical Merit [70%] and Price [30%]</i>	16
ATTACHMENT 1 TO PART 4, TECHNICAL AND FINANCIAL CRITERIA.....	18
PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION	32
5.1 CERTIFICATIONS AND INFORMATION REQUIRED PRECEDENT TO CONTRACT AWARD	32
5.1.1 <i>Integrity Provisions – Required Documentation</i>	32
5.2.1 <i>Federal Contractors Program for Employment Equity - Bid Certification</i>	32
5.2.2 <i>Additional Certifications Required Precedent to Contract Award</i>	33
ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD	34
PART 6 – SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS	36
6.1 SECURITY REQUIREMENT	36
6.2 FINANCIAL CAPABILITY.....	36
6.3 INSURANCE REQUIREMENTS	36
PART 7 – RESULTING CONTRACT CLAUSES	38
7.1 STATEMENT OF WORK	38

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

7.2	STANDARD CLAUSES AND CONDITIONS	38
7.2.1	General Conditions	38
7.2.2	Supplemental General Conditions	38
7.2.3	Intellectual Property Rights	43
4007	43
7.2.4	Inspection and Acceptance	43
7.2.5	Non-Disclosure Agreement	43
7.3	SECURITY REQUIREMENT	44
7.4	TERM OF CONTRACT	44
7.4.1	Period of the Contract	44
7.4.2	Option to Extend the Contract	44
7.4.3	Termination on Thirty Days Notice	45
7.4.4	Comprehensive Land Claims Agreements (CLCAs)	45
7.5	AUTHORITIES	45
7.5.1	Contracting Authority	45
7.5.2	Program Authority	45
7.5.3	Contractor's Representative	46
7.6	PAYMENT	46
7.6.1	Basis of Payment	46
7.6.1.1	Firm Unit Price	46
7.6.2	Method of Payment	46
7.6.3	SACC Manual Clauses	47
7.6.4	Electronic Payment of Invoices - Contract	47
7.6.5	Discretionary Audit	47
7.7	INVOICING INSTRUCTIONS	47
7.8	CERTIFICATIONS AND ADDITIONAL INFORMATION	48
7.8.1	Compliance	48
7.8.2	Federal Contractors Program for Employment Equity - Default by the Contractor	48
7.9	APPLICABLE LAWS	48
7.10	PRIORITY OF DOCUMENTS	48
7.11	FOREIGN NATIONALS	49
7.12	INSURANCE REQUIREMENTS	49
7.13	PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS	49
7.14	GOVERNMENT OF CANADA WEB STANDARDS	49
ANNEX A, STATEMENT OF WORK		50
ANNEX B, BASIS OF PAYMENT		76
ANNEX C, SECURITY REQUIREMENTS CHECK LIST		79
ANNEX D, INSURANCE REQUIREMENTS		80
ANNEX E, NON-DISCLOSURE AGREEMENT		82

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

PS MEMORIAL GRANT PROGRAM FOR FIRST RESPONPERS

Bid solicitation #0D160-183745/C for the provision of the following professional services: Specialized Assessment Services to Use Adjudication Expertise to Assess Eligibility and Support the Administration of the Memorial Grant Program for First Responders as defined in the Annex A – Statement of Work.

PART 1 – GENERAL INFORMATION

1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include Pricing Schedule, Technical and Financial Criteria and Additional certifications precedent to Contract Award.

The Annexes include the Statement of Work, Basis of Payment, Security Requirements Check List, Insurance Requirements and Non-Disclosure Agreement.

1.2 Summary

1.2.1 Public Services and Procurement Canada (PSPC) on behalf of the Department of Public Safety Canada is seeking to establish a contract for the provision of Professional Services that consist of specialized services that use adjudication competencies to assess eligibility and support the administration for the Memorial Grant for First Responders (Memorial Grant Program) as defined in Annex "A", Statement of Work. The period of the resulting contract will be from contract award to March 31, 2021, with an irrevocable option to extend the period of the contract by two (2) additional two (2) year periods under the same conditions. The Maximum Fiscal year budget for providing services and assessing applications for Memorial Grant Program for First Responders may be up to \$1,000,000.00 inclusive of all taxes.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

This bid solicitation allows bidders to use the epost Connect service provided by Canada Post Corporation for bid submission. Bidders must refer to Part 2 of the bid solicitation entitled Instructions, and Part 3 entitled Bid reparation Instructions, of the bid solicitation for further information.

1.2.2 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

1.2.3 The resulting contract contract will not include deliveries of services and goods within locations of Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services and goods within locations of Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to be treated as a separate procurement not forming part of the bid solicitation.

1.3 Debriefings

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

PART 2 – BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<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 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

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

Delete: 60 days

Insert: 120 calendar days.

2.2 Submission of Bids

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

2.3 Former Public Servant

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

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

Definitions

For the purposes of this clause,

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

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

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

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

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension?

Yes () No ()

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

- (a) name of former public servant; and
- (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; and
- g) number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

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

2.4 Enquiries - Bid Solicitation

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

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 question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

2.5 Applicable Laws

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

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

2.6 Basis for Canada's Ownership of Intellectual Property

Public Safety Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#): the Intellectual Property in Foreground Information consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

2.7 Improvement of Requirement During Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least 10 days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

PART 3 – BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- a) Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.
- b) The bid must be separated as follows:

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

- c) If the Bidder chooses to submit its bid electronically using the epost Connect service provided by Canada Post Corporation:
- o the Bidder is invited to consult the information available on the Canada Post Corporation website (<https://www.canadapost.ca/cpc/en/business/postal-services/digital-mail/epost-connect.page>);
 - o the Bidder should refer to section 08, Transmission by facsimile or by epost Connect, of the 2003 standard instructions. Sub-section 2, epost connect, contains instructions and conditions;
 - o the Bidder must submit its bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment
- d) If the Bidder chooses to submit its bid to the PWGSC Bid Receiving Unit **electronically not using the epost Connect service provided by Canada Post Corporation**, Canada requests one envelope containing one copy of the bid on a USB key or a CD. The Bidder should ensure that the Bidder's name and address and bid solicitation number are clearly visible on the envelope.
- e) Canada is not requesting hard copies of the bid. However, if the Bidder chooses to submit its bid to the PWGSC Bid Receiving Unit in hard copies, Canada requests:

Section I: 2 hard copies
Sections II, III and IV: 1 hard copy of the 3 sections

- f) If there is a discrepancy between the wording of any copies of the bid that appear on the following list, the wording of the copy that first appears on the list has priority over the wording of any copy that subsequently appears on the list:
- o the electronic copy of the bid submitted by using the epost Connect service provided by Canada Post Corporation;
 - o the electronic copy of the bid submitted to the PWGSC Bid Receiving Unit on a USB key or a CD;
 - o the hard copies of the bid submitted to the PWGSC Bid Receiving Unit.

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

If the Bidder chooses to submit its bid in hard copies, 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; and
(b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](#).

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

To assist Canada in reaching its objectives, bidders should:

1. use paper containing fiber certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
2. use an environmentally-preferable format including black and white printing instead of color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

Section I: Technical Bid

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

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

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

- A. Bidders must submit their financial bid in Canadian funds and in accordance with the pricing schedule detailed in Attachment 1 to Part 3.
- B. Bidders must submit their prices FOB destination; Canadian customs duties and excise taxes included, as applicable; and Applicable Taxes excluded.
- C. When preparing their financial bid, Bidders should review clause 4.1.2, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.6, Payment, of Part 7 of the bid solicitation.

D. Electronic Payment of Invoices - Bid

Canada requests that bidders:

- 1. select option 1 or, as applicable, option 2 below; and
- 2. include the selected option in Section II of their bid.

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

Option 1:

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

- ☐ VISA Acquisition Card
- ☐ MasterCard Acquisition Card
- ☐ Direct Deposit (Domestic and International)
- ☐ Electronic Data Interchange (EDI)
- ☐ Wire Transfer (International Only)
- ☐ Large Value Transfer System (LVTS) (Over \$25M)

Option 2:

- ☐ The Bidder does not accept to be paid by Electronic Payment Instruments.

Section III: Certifications

In Section III of their bid, bidders should provide the certifications required under Part 5 and, as applicable, any associated additional information.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

Section IV: Additional Information

In Section IV of their bid, bidders should provide:

1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 6.1, Security Requirement, of the bid solicitation:
 - a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
 - 1) the name of the individual;
 - 2) the date of birth of the individual; and
 - 3) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;
 - and
 - b) for each proposed location of work performance or document safeguarding, the address containing the information below.

Address:

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

City, Province, Territory / State

Postal Code / Zip Code

Country

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder should complete this pricing schedule and include it in its financial bid once completed. As a minimum, the Bidder must respond to this pricing schedule by including in its financial bid for each of the periods specified below its quoted all-inclusive fixed Monthly Fee (in \$CND).

The maximum funding available for the Contract resulting from the bid solicitation is \$1,000,000.00 (Applicable Taxes included) per fiscal year. Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

The Level of effort (months) included in this pricing schedule are provided for bid evaluated price determination purposes only. They are not to be considered as a contractual guarantee. Their inclusion in this pricing schedule does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

If the Bidder leaves one or more table blank, Canada will declare its bid non-responsive.

Under any resulting contract, Canada will not accept travel and living expenses that may need to be incurred by the contractor for any relocation of resources required to satisfy its contractual obligations.

Solicitation No. - N° de l'invitation
 0D160-183745/C
 Client Ref. No. - N° de réf. du client
 0D160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
 423zg.0D160-183745

Buyer ID - Id de l'acheteur
 423ZG
 CCC No./N° CCC - FMS No./N° VME

1. PROFESSIONAL FEES - INITIAL CONTRACT PERIOD (Contract Award Date TO March 31, 2021)

INITIAL CONTRACT PERIOD				
	PERIOD	Firm all-inclusive Monthly Fee (In Cdn \$)	Volumetric Data (months)	FIRM ALL-INCLUSIVE MONTHLY FEE TOTAL (in \$CDN)
		A	B	C= A*B
1.1	Year 1: Contract award to March 31, 2019 * see Note 1*	\$ _____	7	\$ _____
1.2	Year 2: April 01, 2019 to March 31, 2020	\$ _____	12	\$ _____
1.3	Year 3: April 01, 2020 to March 31, 2021	\$ _____	12	\$ _____
Total Initial Contract Period (Taxes extra** see Note 2):				\$ _____ (a)

***Must not exceed the Fiscal year Maximum budget of \$1,000,000.00 inclusive of all taxes.

*Note 1: Year 1 must not exceed maximum budget of \$584,000.00 inclusive of all taxes.

** Note 2: HST tax will be used for the total evaluated price (13%).

2. START-UP AND TEST PHASE FEES – FROM CONTRACT AWARD TO OPERATIONAL PHASE (no longer than six months) see definition in Annex A, Statement of Work, sections 5.0 Start-Up Phase Tasks; 5.1 Process Backlog of Applicants, 5.5.3 Provide Progress Updates and Test Plan and 6.0 Start-Up Phase – Deliverable table

START-UP AND TEST PHASE FEES		
CATEGORY	Firm Unit Price (In Cdn \$)	FIRM UNIT PRICE (in \$CDN)
	A	C= B
2.1 Start-up Phase	\$ _____	\$ _____
2.2 Test Phase	\$ _____	\$ _____
Total Start-Up and Test Phase Fees (Taxes extra):		\$ _____ (b)

*Must not exceed the Fiscal year Maximum budget of \$416,000.00 inclusive of all taxes.

**Note 2: HST tax will be used for the total evaluated price (13%).

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

3. PROFESSIONAL FEES – OPTIONAL PERIODS

3.1 2 (two) additional 1 period of 2 year Option

OPTIONAL CONTRACT PERIOD YEARS				
	PERIOD	Firm all-inclusive Monthly Fee (In Cdn \$)	Volumetric Data (months)	FIRM ALL-INCLUSIVE FEES (in \$CDN)
		A	B	C= A*B
3.1	Year 1: April 01, 2021 to March 31, 2023	\$ _____	12	\$ _____
3.2	Year 2: April 01, 2023 to March 31, 2025	\$ _____	12	\$ _____
Total Optional Contract Periods (Taxes extra):				\$ _____ (c)

*Must not exceed the Fiscal year Maximum budget of \$1,000,000.00 inclusive of all taxes.

**Note 2: HST tax will be used for the total evaluated price (13%).

4. TOTAL EVALUATED PRICE SUMMARY

Total Evaluated Price for Initial Contract Period (a)	\$ _____
Total Start-Up and Test Phase Fees (b)	\$ _____
Total Evaluated Price for Options (c)	\$ _____
Total Evaluated price (a+b+c)	\$ _____

PART 4 – EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

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

4.1.1 Technical Evaluation

4.1.1.1 Joint Venture Experience

- a) Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.

- b) A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.

- c) Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

that show in total 100 billable days.

- d) Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

4.1.1.2 Mandatory Technical Criteria

Refer to Attachment 1 to Part 4.

4.1.1.3 Point Rated Technical Criteria

Refer to Attachment 1 to Part 4. Point-rated technical criteria not addressed will be given a score of zero.

4.1.2 Financial Evaluation

- 4.1.2.1** For bid evaluation and Contractor selection purposes only, the evaluated price of a bid will be determined in accordance with the Pricing Schedule detailed in Attachment 1 to Part 3.

4.1.2.1 Mandatory Financial Criteria

Refer to Attachment 1 to Part 4.

4.2 Basis of Selection

4.2.1. Basis of Selection – Highest Combined Rating of Technical Merit [70%] and Price [30%]

- 4.2.1.1 To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all the mandatory evaluation criteria; and
- (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.

- 4.2.1.2 Bids not meeting 4.2.1.1 (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.

- 4.2.1.3 The lowest evaluated price (LP) of all responsive bids will be identified and a pricing score (PS), determined as follows, will be allocated to each responsive bid (i): $PS_i = LP / P_i \times 30$. P_i is the evaluated price (P) of each responsive bid (i).

- 4.2.1.4 A technical merit score (TMS), determined as follows, will be allocated to each responsive bid (i): $TMS_i = OS_i \times 70$. OS_i is the overall score (OS) obtained by each responsive bid (i) for all the point rated technical criteria specified in Attachment 1 to Part 4, determined as follows: total number of points obtained / maximum number of points available.

- 4.2.1.5 The combined rating (CR) of technical merit and price of each responsive bid (i) will be determined as follows: $CR_i = PS_i + TMS_i$.

- 4.2.1.6 The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. In the event two or more responsive bids have the same highest combined rating of technical merit and price, the responsive bid with the lowest evaluated price will be recommended for award of a contract.

Solicitation No. - N° de l'invitation
0D160-183745/C
 Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

4.2.1.7 The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of the technical merit and price, respectively.

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Score for All the Point Rated Technical Criteria	OS1: 98/135	OS2: 120/135	OS3: 82/135
Bid Evaluated Price	P1: C\$60,000	P2: C\$55,000	LP and P3: C\$50,000
Calculations	Technical Merit Score (OSi x 70)	Pricing Score (LP/Pi x 30)	Combined Rating
Bidder 1	98/135 x 70 = 50.81	50/60 x 30 = 24.99	75.80
Bidder 2	120/135 x 70 = 62.22	50/55 x 30 = 27.27	89.49
Bidder 3	82/135 x 70 = 42.52	50/50 x30 = 30.00	72.52

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
423ZG
File No. - N° du dossier
423Zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ATTACHMENT 1 TO PART 4, TECHNICAL AND FINANCIAL CRITERIA

Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

NO.	MANDATORY TECHNICAL CRITERIA	Compliance/ Demonstration
MT1.	<p>The contractor must demonstrate that they have completed a minimum of 3 projects, one of which was at a minimum 12 months in duration, within the past 5 years as of bid closing in providing customer contact services including in-bound inquiries and outbound interactions. All three (3) of the projects combined must demonstrate the following:</p> <ul style="list-style-type: none">(a) Evidence of supportive sensitive client service to at risk or vulnerable individuals dealing with loss or suffering or death;(b) Supported clients through the information gathering and processes of a claim or application or entitlement system; and;(c) Evidence that the bidder had trained their personnel to provide client service to individuals dealing with loss or suffering or death. <p>This experience must be demonstrated by providing detailed references in the form of signed letter(s), from a Canadian organization(s) for which these requirements were provided. The letter(s) must be from an organization which is independent from the contractor (i.e. neither party has undue influence over the other as a result of a non-arm's length relationship) and cite specific examples, but not limited to, the requirements specified in items (a) – (c). Multiple letters may be used to satisfy the requirements described above.</p>	<p>To demonstrate its experience, the Bidder must provide at least the following information for each project for which the experience meets the requirements of this evaluation criterion:</p> <ul style="list-style-type: none">1. Demonstration in completing a minimum of 3 projects providing customer contact services as listed within MT.1 a, b and c;2. The period for each of the project for which the services were provided, in a format including month and year information (mm/yyyy); and3. Signed letter (s) from a Canadian organization(s) for which these services were provided that include the name of the external client and contact information, phone number, e-mail address and business address.
MT2.	<p>The contractor must demonstrate that they have completed a minimum of 3 projects, one of which was at a minimum 12 months in duration, within the past 5 years as of bid closing in providing eligibility determination or recommendation services. All three (3) of the projects combined must demonstrate the following minimum requirements:</p> <ul style="list-style-type: none">(a) Providing management or administration or adjudication services that decide on or recommend the payment of benefits or eligibility for services;(b) Obtaining informed consent from applicants or clients and;	<p>To demonstrate its experience, the Bidder must provide at least the following information for each project for which the experience meets the requirements of this evaluation criterion:</p> <ul style="list-style-type: none">1. A detailed project description in providing eligibility determination or recommendation services throughout the duration of projects listed within MT.2 a, b and c;

Solicitation No. - N° de l'invitation
0D160-183745/C
 Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
423ZG
 File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

NO.	MANDATORY TECHNICAL CRITERIA	Compliance/ Demonstration
	<p>(c) Collecting personal and protected data from applicants to use for determining eligibility for benefits or services;</p> <p>This experience must be demonstrated by providing detailed project descriptions as stated in point a,b and c above, along with signed letter(s), from a Canadian organization(s) for which these requirements were provided. The letter(s) must be from an organization which is independent from the contractor (i.e. neither party has undue influence over the other as a result of a non-arm's length relationship) and cite specific examples, but not limited to, the requirements specified in items (a) – (c). Multiple letters may be used to satisfy the requirements described above..</p>	<p>2. The project period for each of the project for which the services were provided, in a format including month and year information (mm/yyyy); and</p> <p>3. Signed letter (s) from a Canadian organization(s) for which these services were provided that include the name of the external client and contact information, phone number, e-mail address and business address.</p>
MT3.	<p>The contractor must provide a Management Plan for the Privacy and Protection of Personal Information with its Technical Proposal. The plan must provide a comprehensive description of all actions and precautions the contractor will undertake so that its people, systems and processes protect personal information as it is gathered, processed, stored and shared.</p> <p>Please refer to Statement of Work, sections 5.2 Refine Management Plan for the Privacy and Protection of Personal Information; 5.2.1 Develop Forms for Collection of Personal Information and Authorized Representation.</p>	<p>To demonstrate this experience, the bidder must provide a Management Plan for the Protection of Personal Information that include the following:</p> <ol style="list-style-type: none"> 1. A comprehensive description of all actions and precautions the contractor is undertaking but not limited to: that its people, systems and processes protect personal information as it is gathered, processed, stored and shared; and 2. A comprehensive description on how the bidder complies with the provincial regulations where the contractor operates
MT4.	<p>The contractor must demonstrate experience and capability in the successful modification and customization or configuration of public-facing internet-based information exchange, Case Management Technology and secure electronic document storage/sharing capabilities to provide additional user functionality, including reporting, provided in a Commercial Off the Shelf (COTS) or existing custom developed solution.</p> <p>To demonstrate its experience, the contractor must provide project(s) description that have been implemented. The project(s) must include a description of the scope of the modification, customization or configuration work, the additional functionality provided and technical details of how the work was successfully implemented.</p> <p>Multiple project summaries may be used to meet this requirement.</p>	<p>To demonstrate its experience, the Bidder must provide at a minimum the following information for each project for which the experience meets the requirements of this evaluation criterion:</p> <ol style="list-style-type: none"> 1. A detailed implemented project(s) description of the scope of the modification, customization or configuration work provided in a Commercial Off the Shelf (COTS) or existing custom developed solution 2. A detailed description of how the work was successfully implemented; 3. The project period for each of the project for which the services were provided, in a format including month and year information; and 4. the name of the external client and contact information, phone number, e-mail address and business address.
MT5.	<p>The contractor must demonstrate that they have access to, a Senior Application Assessment Specialist responsible for application assessment. The contractor must submit the resume of the proposed resource for this function which must clearly substantiate the following experience:</p>	<p>The Bidder must provide the Senior Application Specialist curriculum vitae, and demonstrate how the resource meets each of these criteria by including at a minimum the following information:</p>

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
423ZG
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

MANDATORY TECHNICAL CRITERIA		Compliance/ Demonstration
NO.		
	<p>a) extensive experience in determining eligibility for complex benefits/services or managing a claims team or claims adjudication or adjusting involving serious loss and/or complex claims; (Extensive experience is defined as a minimum of ten (10) years working in the property and casualty or life or disability or health benefits or workers' compensation or other compensation/award programs.); and,</p> <p>b) a university degree or related certification in claims adjudication training or adjusting training.</p>	<ol style="list-style-type: none">1. Description of the roles and responsibilities clearly identifying how they meet the extensive experience listed in MT5 a);2. Timeframe (from-to dates month/year) performing the services; and3. Copy of a University degree and/ or related certification in claims adjudication training or, if obtained outside Canada, the equivalent as established by a recognized Canadian academic credentials assessment service;4. Reference name and contact information, phone number, e-mail address and business address who can be contacted to validate the above information.
MT6.	<p>The contractor must demonstrate that they have access to Expert Medical Consultants on an as needed basis and possess at a minimum:</p> <p>a) licenses to practice medicine in Canada;</p> <p>b) specialty certifications related to the diagnosed occupational disease or diagnosed/presumed psychological impairment; and</p> <p>c) experience in assessing insurance related medical issues and/or providing opinions to insurance, legal or other benefit/service programs</p>	<p>The Bidder must provide the Expert Medical Consultant(s) curriculum vitae, and demonstrate how the resource meets each of these criteria by including the following information:</p> <ol style="list-style-type: none">1. Description of the experience in assessing insurance related medical issues and/ or providing opinions to insurance legal or other benefit/ service program);2. Timeframe (from-to dates month/year) performing the services; and3. Copy of a valid license(s) to practice medicine in Canada. <p>Reference name and contact information, phone number, e-mail address and business address who can be contacted to validate the above information.</p>

Mandatory Financial Criteria

The bid must meet the mandatory financial criteria specified below. The Bidder must certify its acceptance to support compliance with this requirement.

Bids which fail to meet the mandatory financial criteria will be declared non-responsive.

MANDATORY CRITERIA		Agree/ Not Agree
NO.		
MF.1	The Bidder's financial proposal must not exceed \$1,000,000.00 (Applicable taxes included) per fiscal year. Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.	

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

Point Rated Technical Criteria

Bids which meet all the mandatory technical and Financial 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.

RT #	Category	Weighting
1	Business Processes	300
2	Backlog of Applicants Eligible for Assessment	100
3	Information Technology and Contact Centre Solution	200
4	Reports and Dashboards	100
5	Human Resource Plan	100
6	Operations Plan	200
	Total Overall Score	1000
	Minimum Score Required (60%)	600

For the purposes of this solicitation please refer to Appendix D – Defined Terms within the Statement of Work for the definition of terms used in the evaluation criteria.

Rated Criteria

Note to contractors: The following provides definitions on the meaning of terms that are used in the rating guide.

Comprehensive	Canada deems that the proposed response provides details to fully assess the contractor's level of knowledge, understanding or capability of implementing a successful Memorial Grant program solution to ensure success if utilized under a resulting contract.
Innovative	Canada deems that the proposed response introduces ideas, concepts or methodologies that will have a high probability of enabling innovative efficiencies or improvements in Service delivery that would otherwise not be achievable.
Feasible	Canada deems that the proposed response is well founded, reasonable, and suitable to being used with a high probability of being feasible and successfully utilized or implemented under the resulting contract.
Effective	Canada deems that the proposed response has a high probability of being effective and successful in producing desired or intended results if utilized under a resulting contract.

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
RT1.0	<p>Business Processes</p> <p>The contractor should provide detailed and illustrated business processes, sub processes, activities and sub activities and description that will define their approach to delivering the Memorial Grant Program.</p> <p>A complete response should include how the business processes will deliver:</p> <ul style="list-style-type: none"> Specialized services that use adjudication competencies to assess eligibility; Well-managed and client focused services to the families of First Responders who die as a result of their duties that incorporates the principles of the advocacy-based claims management model; Effective support for the gathering of the information and facts necessary to make complete and accurate recommendations about Memorial Grant Program eligibility and; Continuously improved business processes throughout the term of the contract. 	300 as detailed in RT1.1, RT1.2 and RT1.3 below	The plan will be assessed using criteria RT1.1, RT1.2 and RT1.3
RT1.1	The degree of feasibility and Innovation of the proposed approach described in the contractor's detailed and illustrated business processes to successfully deliver services to support the administration of the Memorial Grant Program.	100	<p>Points to be awarded on the following basis:</p> <p>0 points Not described or not feasible 25 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution 50 points Moderately feasible 75 points Highly feasible 100 points Highly feasible that incorporates an innovative approach</p>
RT1.2	The degree of effectiveness and Innovation of the processes described in the contractor's detailed and illustrated business processes to successfully deliver services to support the administration of the Memorial Grant Program.	100	<p>Points to be awarded on the following basis</p> <p>0 points Not described or not effective 25 points Low probability of being successful or in producing a desired or intended result 50 points Moderate probability of being successful or in producing a desired or intended result. 75 points High probability of being successful or in producing a desired or intended result 100 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach.</p>

Solicitation No. - N° de l'invitation
OD160-183745/C
 Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
423ZG
 File No. - N° du dossier
423zg.OD160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
RT1.3	The degree of comprehension to which the contractor's detailed and illustrated business processes demonstrates the contractor's knowledge, understanding and capability to successfully deliver services to support the administration of the Memorial Grant Program.	100	<p>Points to be awarded on the following basis:</p> <p>0 points The response demonstrates very little or no knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified.</p> <p>25 points The response demonstrates a limited knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. Several major deficiencies in this regard were identified.</p> <p>50 points The response demonstrates a good level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. A number of minor deficiencies or one major deficiency in this regard was identified.</p> <p>75 points The response demonstrates a very good level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. A limited number of minor deficiencies in this regard were identified and there were no major omissions.</p> <p>100 points The response demonstrates an excellent level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. No deficiencies were identified.</p>
RT2.0	<p>Backlog of applicants eligible for assessment</p> <p>The contractor should describe, in detail, their proposed approach for the Priority Processing of the Inventory of Applicants Eligible for Assessment in a prompt and effective manner while simultaneously implementing the other requirements of the start-up phase.</p> <p>A complete response should include:</p> <ul style="list-style-type: none"> • An overview and outline of the approach, including reporting to the Program Authority; • Challenges to processing the inventory of applicants eligible for assessment; • What steps are being taken and the estimated timeframes for reducing the inventory processed and; • The methods for keeping applicants eligible for assessment informed about the status of applications. 	100 as detailed in RT2.1, RT 2.2, and RT 2.3 below	This response will be assessed using criteria RT2.1, RT2.2 and RT2.3
RT 2.1	The degree of feasibility and innovation of the proposed approach to reducing the backlog of applicants eligible for assessment.	33	<p>Points to be awarded on the following basis:</p> <p>0 points Not described or not feasible</p>

Solicitation No. - N° de l'invitation
OD160-183745/C
Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
423ZG
File No. - N° du dossier
423Zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
			<p>5 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution</p> <p>17 points Moderately feasible</p> <p>25 points Highly feasible</p> <p>33 points Highly feasible that incorporates an innovative approach</p>
RT 2.2	The degree of effectiveness and Innovation of the proposed approach to reducing the backlog of applicants eligible for assessment.	33	<p>Points to be awarded on the following basis:</p> <p>0 points Not described or not feasible</p> <p>5 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution</p> <p>17 points Moderately feasible</p> <p>25 points Highly feasible</p> <p>33 points Highly feasible that incorporates an innovative approach</p>
RT2.3	The degree of comprehension of which the proposed approach to reduce the backlog of applicants eligible for assessment and demonstrates the contractor's knowledge, understanding and capability to promptly reduce the inventory.	34	<p>Points to be awarded on the following basis:</p> <p>0 points The response demonstrates very little or no knowledge, understanding or capability to promptly reduce the inventory. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified.</p> <p>5 points The response demonstrates a limited knowledge, understanding or capability to promptly reduce the inventory. Several major deficiencies in this regard were identified.</p> <p>17 points The response demonstrates a good level of knowledge, understanding or capability to promptly reduce the inventory. A number of minor deficiencies or one major deficiency in this regard was identified.</p> <p>25 points The response demonstrates a very good level of knowledge, understanding or capability to promptly reduce the inventory. A limited number of minor deficiencies in this regard were identified and there were no major omissions.</p> <p>34 points The response demonstrates an excellent level of knowledge, understanding or capability to promptly reduce the inventory. No deficiencies were identified.</p>
RT3.0	<p>Information Technology and Contact Centre Solution</p> <p>The contractor should describe in detail their proposed approach on how they will implement information technology and a contact centre to support the administration of the Memorial Grant Program.</p> <p>A complete response should include:</p> <p>Requirements Compliance</p> <ul style="list-style-type: none"> • All functionalities and reporting capabilities of the proposed solution; • Physical infrastructure and facilities; 	200 as detailed in RT3.1, RT3.2 and RT3.3 below	<p>The approach will be assessed against criteria RT3.1, RT3.2, and RT3.3</p>

Solicitation No. - N° de l'invitation 0D160-183745/C Client Ref. No. - N° de réf. du client 0D160-183745		Amd. No. - N° de la modif. 423ZG File No. - N° du dossier 423zg.0D160-183745		Buyer ID - Id de l'acheteur 423ZG CCC No./N° CCC - FMS No./N° VME	
No	POINT-RATED CRITERIA			MAX POINTS	RATING GUIDE
	<div><ul style="list-style-type: none">• System performance specifications;• Data conversion and migration;• Security• Reporting</div> <div>Solution Architecture<ul style="list-style-type: none">• Detailed Solution Architecture including the business view, information view, Application/component view, technology view and deployment view;• The maintainability of the solution. This quality attribute relates the level of effort required to identify a problem and correct it;• The extensibility of the solution. This quality attribute relates the ability to extend a system and the level of effort required to implement the extension. The following areas will be considered: workflows, data elements, user interfaces, business rules, data validation and parametrization;• The solution's level of fault tolerance;• The solution's level of transferability to an alternate vendor and;• The solution's level of scalability.</div> <div>Application Life-Cycle Management (ALM)<ul style="list-style-type: none">• Methodology and tools used;• Implementation plans;• Requirement management;• Testing and quality assurance and;• Defect management.</div> <div>Technical Operations<ul style="list-style-type: none">• System operations and maintenance and;• Solution health monitoring including escalation processes.</div>			66	<div>Points to be awarded on the following basis:</div> <div><div>0 points</div><div>Not described or not feasible</div></div> <div><div>20 points</div><div>Feasibility is deemed unlikely and therefore not likely to deliver a successful solution</div></div>
RT 3.1	The degree of feasibility and Innovation of the proposed approach to successfully deliver services to support the administration of the Memorial Grant Program.				

Solicitation No. - N° de l'invitation
OD160-183745/C
Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
423ZG
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
			<p>33 points Moderately feasible</p> <p>45 points Highly feasible</p> <p>66 points Highly feasible that incorporates an innovative approach</p>
RT 3.2	The degree of effectiveness and Innovation of the proposed approach to successfully deliver services to support the administration of the Memorial Grant Program.	66	<p>Points to be awarded on the following basis:</p> <p>0 points Is not described or not effective</p> <p>20 points Low probability of being successful or in producing a desired or intended result</p> <p>33 points Moderate probability of being successful or in producing a desired or intended result</p> <p>45 points High probability of being successful or in producing a desired or intended result</p> <p>66 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach</p>
RT 3.3	The degree of comprehension of which the proposed approach response demonstrates the contractor's knowledge, understanding and capability to successfully deliver services to support the administration of the Memorial Grant Program.	68	<p>Points to be awarded on the following basis:</p> <p>0 points The response demonstrates very little or no knowledge, understanding or capability of implementing a successful infrastructure solution. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified.</p> <p>20 points The response demonstrates a limited knowledge, understanding or capability of implementing a successful infrastructure solution. Several major deficiencies in this regard were identified.</p> <p>33 points The response demonstrates a good level of knowledge, understanding or capability of implementing a successful infrastructure solution. A number of minor deficiencies or one major deficiency in this regard was identified.</p> <p>45 points The response demonstrates a very good level of knowledge, understanding or capability of implementing a successful infrastructure solution. A limited number of minor deficiencies in this regard were identified and there were no major omissions.</p> <p>68 points The response demonstrates an excellent level of knowledge, understanding or capability of implementing a successful infrastructure solution. No deficiencies were identified.</p>
RT 4.0	<p>Reports and Real Time Dashboards</p> <p>The contractor should describe in detail their approach to implementing reporting and real time dashboard solutions.</p> <p>A comprehensive response should include:</p> <ul style="list-style-type: none"> The contractors proposed approach to how the reporting and real time dashboard capabilities will inform PS about: 	100 as detailed in RT 4.1, RT 4.2, and RT 4.3. below	This response will be assessed using criteria RT4.1, RT4.2 and RT4.3

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
	<ul style="list-style-type: none"> ○ The ongoing assessment of the administration of the Memorial Grant Program; ○ The contractors adherence to service standards; • How reporting capabilities will be able to deliver standard and ad hoc reporting; • How reporting and real time dashboards will assist PS to fulfill its fiscal planning and other program metrics about volume, status, jurisdictional breakdowns, etc.; • Demonstration of a flexible and customizable solution and; • The ability of the proposed approach to support the Memorial Grant Program's performance measurement strategy. 		<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points Not described or not feasible 5 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution 17 points Moderately feasible 25 points Highly feasible 33 points Highly feasible that incorporates an innovative approach
RT4.1	The degree of feasibility and Innovation of the proposed approach to fully informing PS about the contractor's ongoing administration of the Memorial Grant Program.	33	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points Is not described or not effective 5 points Low probability of being successful or in producing a desired or intended result 17 points Moderate probability of being successful or in producing a desired or intended result 25 points High probability of being successful or in producing a desired or intended result 33 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach
RT4.2	The degree of effectiveness and Innovation of the proposed approach to fully informing PS about the contractor's ongoing administration of the Memorial Grant Program.	33	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points Is not described or not effective 5 points Low probability of being successful or in producing a desired or intended result 17 points Moderate probability of being successful or in producing a desired or intended result 25 points High probability of being successful or in producing a desired or intended result 33 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach
RT4.3	The degree of comprehension of which the proposed approach demonstrates the contractor's knowledge, understanding and capability to fully inform PS about the contractor's ongoing administration of the Memorial Grant Program.	34	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points The response demonstrates very little or no knowledge, understanding or capability of implementing a successful business intelligence and reporting solution. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified. 5 points The response demonstrates a limited knowledge, understanding or capability of implementing a successful business intelligence and reporting solution. Several major deficiencies in this regard were identified.

<div>Solicitation No. - N° de l'invitation 0D160-183745/C Client Ref. No. - N° de réf. du client 0D160-183745</div> <div>Amd. No. - N° de la modif. 423ZG File No. - N° du dossier 423zg.0D160-183745</div> <div>Buyer ID - Id de l'acheteur 423ZG CCC No./N° CCC - FMS No./N° VME</div>		POINT-RATED CRITERIA		MAX POINTS		RATING GUIDE	
						17 points The response demonstrates a good level of knowledge, understanding or capability of implementing a successful business intelligence and reporting solution. A number of minor deficiencies or one major deficiency in this regard was identified. 25 points The response demonstrates a very good level of knowledge, understanding or capability of implementing a successful business intelligence and reporting solution. A limited number of minor deficiencies in this regard were identified and there were no major omissions. 33 points The response demonstrates an excellent level of knowledge, understanding or capability of implementing a successful business intelligence and reporting solution. No deficiencies were identified.	
RT5.0		Human Resources Plan The Human Resource Plan should demonstrate how the contractor's proposed service delivery team will be able to successfully provide all services necessary to support the administration of the Memorial Grant Program in both official languages by: <ul style="list-style-type: none">Describing their proposed service delivery team, associated roles and responsibilities and demonstrate this will ensure high quality, consistent and client focused service delivery;Identifying the key positions and a single point of contact for PS that will provide service delivery capabilities and substantiate that sufficient depth breadth of experience exists to successfully:<ul style="list-style-type: none">project manage the Start-Up Phase;develop, implement and maintain an information technology and contact centre solution;provide sensitive customer service to enquiries and applicants;assess applications for eligibility; andprepare comprehensive recommendation packages for the program authority.Providing, for all key resources the name and resume of the proposed resource, along with any specialized designations or certificates and;Describing the process for handling any changes to personnel that might impede the delivery of the service.		100 as detailed in RT5.1, RT 5.2, and RT 5.3 below		This response will be assessed using criteria RT5.1, RT5.2 and RT5.3 .	

Solicitation No. - N° de l'invitation
OD160-183745/C
 Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
423ZG
 File No. - N° du dossier
423zg.OD160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
RT 5.1	The degree of feasibility and Innovation of the proposed service delivery team's ability to successfully provide all services necessary to support the administration of the Memorial Grant Program.	33	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points Not described or not feasible 5 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution 17 points Moderately feasible 25 points Highly feasible 33 points Highly feasible that incorporates an innovative approach
RT 5.2	The degree of effectiveness and Innovation of the proposed service delivery team to successfully provide all services necessary to support the administration of the Memorial Grant Program.	33	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points Is not described or not effective 5 points Low probability of being successful or in producing a desired or intended result 17 points Moderate probability of being successful or in producing a desired or intended result 25 points High probability of being successful or in producing a desired or intended result 33 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach
RT5.3	The degree of comprehension of which the proposed service delivery team demonstrates the contractor's knowledge, understanding and capability to successfully provide all services necessary to support the administration of the Memorial Grant Program.	34	<p>Points to be awarded on the following basis:</p> <ul style="list-style-type: none"> 0 points The response demonstrates very little or no knowledge, understanding or capability of implementing a successful Memorial Grant solution. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified. 5 points The response demonstrates a limited knowledge, understanding or capability of implementing a successful Memorial Grant solution. Several major deficiencies in this regard were identified. 17 points The response demonstrates a good level of knowledge, understanding or capability of implementing a successful Memorial Grant solution. A number of minor deficiencies or one major deficiency in this regard was identified. 25 points The response demonstrates a very good level of knowledge, understanding or capability of implementing a successful Memorial Grant solution. A limited number of minor deficiencies in this regard were identified and there were no major omissions. 33 points The response demonstrates an excellent level of knowledge, understanding or capability of implementing a successful Memorial Grant solution. No deficiencies were identified.

Solicitation No. - N° de l'invitation
 OD160-183745/C
 Client Ref. No. - N° de réf. du client
 OD160-183745

Amd. No. - N° de la modif.
 423ZG
 File No. - N° du dossier
 423zg, OD160-183745

Buyer ID - Id de l'acheteur
 423ZG
 CCC No./N° CCC - FMS No./N° VME

No	POINT-RATED CRITERIA	MAX POINTS	RATING GUIDE
RT6.0	Operations Plan The contractor should provide a detailed Operations Plan. A complete plan should include how: <ul style="list-style-type: none"> The contractor will ensure the delivery of client focused services to the families of fallen First Responders; Service will be delivered according to the approved business processes and service standards; Recommendation packages will be accurate and comprehensive The contractor will maintain and/or update communications materials; The contractor will assess its business processes for problems and value opportunities to improve the service and implement changes to those processes and; The contractor's information technology, reporting and real time dashboards support the administration of the Memorial Grant Program. 	200 as detailed in RT6.1, RT6.2 and RT6.3 below	The plan will be assessed using criteria RT6.1, RT6.2, and RT6.3
RT6.1	The degree of feasibility and Innovation of the proposed approach described in the contractor's Operations Plan to successfully support the administration of the Memorial Grant Program.	66	Points to be awarded on the following basis: 0 points Not described or not feasible 20 points Feasibility is deemed unlikely and therefore not likely to deliver a successful solution 33 points Moderately feasible 45 points Highly feasible 66 points Highly feasible that incorporates an innovative approach
RT6.2	The degree of effectiveness and Innovation of the tasks and activities listed in the Operations Plan to successfully support the administration of the Memorial Grant Program.	66	Points to be awarded on the following basis: 0 points Not described or not effective 20 points Low probability of being successful or in producing a desired or intended result 33 points Moderate probability of being successful or in producing a desired or intended result. 45 points High probability of being successful or in producing a desired or intended result 66 points High probability of being successful or in producing a desired or intended result and incorporates an innovative approach.
RT6.3	The degree of comprehension of which the Operations Plan demonstrates the contractor's knowledge, understanding and capability to successfully support the administration of the Memorial Grant Program.	68	Points to be awarded on the following basis: 0 points The response demonstrates very little or no knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. Insufficient information was provided to determine if the contractor's response meets or supports the requirement. Major deficiencies in this regard were identified.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg, 0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

POINT-RATED CRITERIA		MAX POINTS	RATING GUIDE
No			<p>20 points The response demonstrates a limited knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. Several major deficiencies in this regard were identified.</p> <p>34 points The response demonstrates a good level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. A number of minor deficiencies or one major deficiency in this regard was identified.</p> <p>45 points The response demonstrates a very good level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. A limited number of minor deficiencies in this regard were identified and there were no major omissions.</p> <p>68 points The response demonstrates an excellent level of knowledge, understanding or capability of implementing a successful Memorial Grant Program solution. No deficiencies were identified.</p>

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period. The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications and Information Required Precedent to Contract Award

The required certifications and additional information below should be submitted with the bid but may be submitted afterwards. If the required certifications and additional information are not submitted with the bid, the Contracting Authority will inform the Bidder of a time frame within which they must be submitted by the Bidder. Failure to provide the required certifications and additional information within the time frame specified will render the bid non-responsive.

5.1.1 Integrity Provisions – Required Documentation

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

5.2.1 Federal Contractors Program for Employment Equity - Bid Certification

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

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

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

The Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity certification before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority before contract award with a completed Federal Contractors Program for Employment Equity certification for each member of the Joint Venture. Attachment 1 to Part 5, Additional Certifications Precedent to Contract Award, includes a copy of the certification to provide.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

5.2.2 Additional Certifications Required Precedent to Contract Award

The required additional certifications to provide are included in Attachment 1 to Part 5, Additional Certifications Required Precedent to Contract Award.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ATTACHMENT 1 TO PART 5, ADDITIONAL CERTIFICATIONS REQUIRED PRECEDENT TO CONTRACT AWARD

1. Federal Contractors Program For Employment Equity - Certification

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

For further information on the Federal Contractors Program for Employment Equity visit the [Employment and Social Development Canada \(ESDC\) - Labour's website](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html) (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>).

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

Instructions to the Bidder: Complete both A and B.

A. Instructions to the Bidder: Check only one of the following:

- ☐ A1. The Bidder certifies having no work force in Canada.
- ☐ A2. The Bidder certifies being a public sector employer.
- ☐ A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- ☐ A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and / or permanent part-time employees.
- ☐ A5. The Bidder certifies having a combined workforce in Canada of 100 or more permanent full-time and/or permanent part-time employees.
- ☐ A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

or

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

B. Instructions to the Bidder: Check only one of the following:

- ☐ B1. The Bidder is not a Joint Venture.

or

- ☐ B2. The Bidder is a Joint venture. Instructions to the Bidder: Refer to the Joint Venture section of the Standard Instructions. If the Bidder is a Joint Venture, it must provide the Contracting

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

Authority before contract award with a completed Federal Contractors Program for
Employment Equity certification for each member of the Joint Venture.

2. Status and Availability of Resources

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

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

3. 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, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirement

6.1.1 Before award of a contract, the following conditions must be met:

- a. the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- b. the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security 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 and document safeguarding must meet the security requirements as indicated in Part 7- Resulting Contract Clauses; and
- e. the Bidder must provide the address of each proposed site or premise of work performance and document safeguarding as follows:

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

If the information is not provided in or with the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

6.1.2 Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

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

6.2 Financial Capability

SACC Manual clause A9033T (2012-07-16) Financial Capability

6.3 Insurance Requirements

The Bidder must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Bidder, if awarded a contract as a result of the bid solicitation, can be insured in accordance with the Insurance Requirements specified in Annex D.

Solicitation No. - N° de l'invitation

0D160-183745/C

Client Ref. No. - N° de réf. du client

0D160-183745

Amd. No. - N° de la modif.

File No. - N° du dossier

423zg.0D160-183745

Buyer ID - Id de l'acheteur

423ZG

CCC No./N° CCC - FMS No./N° VME

If the information is not provided in the bid, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

PART 7 – RESULTING CONTRACT CLAUSES

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

7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work in Annex A, and the Contractor's technical bid entitled _____, dated _____.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

2035 (2018-06-21), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

7.2.2 Supplemental General Conditions

4008 (2008-12-12), Personal Information

4008 01 (2008-05-12) Interpretation

1. In the Contract, unless the context otherwise requires,

"General Conditions"

means the general conditions that form part of the Contract;

"Personal Information"

means information about an individual, including the types of information specifically described in the [Privacy Act](#), R.S. 1985, c. P-21;

"Record"

means any hard copy document or any data in a machine-readable format containing Personal Information;

2. Words and expressions defined in the General Conditions and used in these supplemental general conditions have the meanings given to them in the General Conditions.
3. If there is any inconsistency between the General Conditions and these supplemental general conditions, the applicable provisions of these supplemental general conditions prevail.

4008 02 (2008-05-12) Ownership of Personal Information and Records

To perform the Work, the Contractor will be provided with and/or will be collecting Personal Information from third parties. The Contractor acknowledges that it has no rights in the Personal Information or the Records and that Canada owns the Records. On request, the Contractor must make all the Personal Information and Records available to Canada immediately in a format acceptable to Canada.

4008 03 (2008-05-12) Use of Personal Information

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

The Contractor agrees to create, collect, receive, manage, access, use, retain, and dispose of the Personal Information and the Records only to perform the Work in accordance with the Contract.

4008 04 (2008-05-12) Collection of Personal Information

1. If the Contractor must collect Personal Information from a third party to perform the Work, the Contractor must only collect Personal Information that is required to perform the Work. The Contractor must collect the Personal Information from the individual to whom it relates and the Contractor must inform that individual (at or before the time when it collects the Personal Information) of the following:
 - a. that the Personal Information is being collected on behalf of, and will be provided to, Canada;
 - b. the ways the Personal Information will be used;
 - c. that the disclosure of the Personal Information is voluntary or, if there is a legal requirement to disclose the Personal Information, the basis of that legal requirement;
 - d. the consequences, if any, of refusing to provide the information;
 - e. that the individual has a right to access and correct his or her own Personal Information; and
 - f. that the Personal Information will form part of a specific personal information bank (within the meaning of the [Privacy Act](#)), and also provide the individual with information about which government institution controls that personal information bank, if the Contracting Authority has provided this information to the Contractor.
2. The Contractor, its subcontractors, and their respective employees must identify themselves to the individuals from whom they are collecting Personal Information and must provide those individuals with a way to verify that they are authorized to collect the Personal Information under a Contract with Canada.
3. If requested by the Contracting Authority, the Contractor must develop a request for consent form to be used when collecting Personal Information, or a script for collecting the Personal Information by telephone. The Contractor must not begin using a form or script unless the Contracting Authority first approves it in writing. The Contractor must also obtain the Contracting Authority's approval before making any changes to a form or script.
4. At the time it requests Personal Information from any individual, if the Contractor doubts that the individual has the capacity to provide consent to the disclosure and use of his or her Personal Information, the Contractor must ask the Contracting Authority for instructions.

4008 05 (2008-05-12) Maintaining the Accuracy, Privacy and Integrity of Personal Information

The Contractor must ensure that the Personal Information is as accurate, complete, and up to date as possible. The Contractor must protect the privacy of the Personal Information. To do so, at a minimum, the Contractor must:

- a. not use any personal identifiers (e.g., social insurance number) to link multiple databases containing Personal Information;

- b. segregate all Records from the Contractor's own information and records;
- c. restrict access to the Personal Information and the Records to people who require access to perform the Work (for example, by using passwords or biometric access controls);
- d. provide training to anyone to whom the Contractor will provide access to the Personal Information regarding the obligation to keep it confidential and use it only to perform the Work. The Contractor must provide this training before giving an individual access to any Personal Information and the Contractor must keep a record of the training and make it available to the Contracting Authority if requested;
- e. if requested by the Contracting Authority, before providing anyone with access to the Personal Information, require anyone to whom the Contractor provides access to the Personal Information to acknowledge in writing (in a form approved by the Contracting Authority) their responsibilities to maintain the privacy of the Personal Information;
- f. keep a record of all requests made by an individual to review his or her Personal Information, and any requests to correct errors or omissions in the Personal Information (whether those requests are made directly by an individual or by Canada on behalf of an individual);
- g. include a notation on any Record(s) that an individual has requested be corrected if the Contractor has decided not to make the correction for any reason. Whenever this occurs, the Contractor must immediately advise the Contracting Authority of the details of the requested correction and the reasons for the Contractor's decision not to make it. If directed by the Contracting Authority to make the correction, the Contractor must do so;
- h. keep a record of the date and source of the last update to each Record;
- i. maintain an audit log that electronically records all instances of and attempts to access Records stored electronically. The audit log must be in a format that can be reviewed by the Contractor and Canada at any time; and
- j. secure and control access to any hard copy Records.

4008 06 (2008-05-12) Safeguarding Personal Information

The Contractor must safeguard the Personal Information at all times by taking all measures reasonably necessary to secure it and protect its integrity and confidentiality. To do so, at a minimum, the Contractor must:

- a. store the Personal Information electronically so that a password (or a similar access control mechanism, such as biometric access) is required to access the system or database in which the Personal Information is stored;
- b. ensure that passwords or other access controls are provided only to individuals who require access to the Personal Information to perform the Work;
- c. not outsource the electronic storage of Personal Information to a third party (including an affiliate) unless the Contracting Authority has first consented in writing;

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

- d. safeguard any database or computer system on which the Personal Information is stored from external access using methods that are generally used, from time to time, by prudent public and private sector organizations in Canada in order to protect highly secure or sensitive information;
- e. maintain a secure back-up copy of all Records, updated at least weekly;
- f. implement any reasonable security or protection measures requested by Canada from time to time; and
- g. notify the Contracting Authority immediately of any security breaches; for example, any time an unauthorized individual accesses any Personal Information.

4008 07 (2008-05-12) Appointment of Privacy Officer

The Contractor must appoint someone to be its privacy officer and to act as its representative for all matters related to the Personal Information and the Records. The Contractor must provide that person's name to the Contracting Authority within ten (10) days of the award of the Contract.

4008 08 (2008-05-12) Quarterly Reporting Obligations

Within thirty (30) calendar days of the end of each quarter (January-March; April-June; July-September; October-December), the Contractor must submit the following to the Contracting Authority:

- a. a description of any new measures taken by the Contractor to protect the Personal Information (for example, new software or access controls being used by the Contractor);
- b. a list of any corrections made to Personal Information at the request of an individual (including the name of the individual, the date of the request, and the correction made);
- c. details of any complaints received from individuals about the way in which their Personal Information is being collected or handled by the Contractor; and
- d. a complete copy (in an electronic format agreed to by the Contracting Authority and the Contractor) of all the Personal Information stored electronically by the Contractor.

4008 09 (2008-05-12) Threat and Risk Assessment

Within ninety (90) calendar days of the award of the Contract and, if the Contract lasts longer than one year, within thirty (30) calendar days of each anniversary date of the Contract, the Contractor must submit to the Contracting Authority a threat and risk assessment, which must include:

- a. a copy of the current version of any request for consent form or script being used by the Contractor to collect Personal Information;
- b. a list of the types of Personal Information used by the Contractor in connection with the Work;
- c. a list of all locations where hard copies of Personal Information are stored;
- d. a list of all locations where Personal Information in machine-readable format is stored (for example, the location where any server housing a database including any Personal Information is located), including back-ups;

- e. a list of every person to whom the Contractor has granted access to the Personal Information or the Records;
- f. a list of all measures being taken by the Contractor to protect the Personal Information and the Records;
- g. a detailed explanation of any potential or actual threats to the Personal Information or any Record, together with an assessment of the risks created by these threats and the adequacy of existing safeguards to prevent these risks; and
- h. an explanation of any new measures the Contractor intends to implement to safeguard the Personal Information and the Records.

4008 10 (2008-05-12) Audit

Canada may audit the Contractor's compliance with these supplemental general conditions at any time. If requested by the Contracting Authority, the Contractor must provide Canada (or Canada's authorized representative) with access to its premises and to the Personal Information and Records at all reasonable times. If Canada identifies any deficiencies during an audit, the Contractor must immediately correct the deficiencies at its own expense.

4008 11 (2008-05-12) Statutory Obligations

1. The Contractor acknowledges that Canada is required to handle the Personal Information and the Records in accordance with the provisions of Canada's [Privacy Act](#), [Access to Information Act](#), R.S. 1985, c. A-1, and [Library and Archives of Canada Act](#), S.C. 2004, c. 11. The Contractor agrees to comply with any requirement established by the Contracting Authority that is reasonably required to ensure that Canada meets its obligations under these acts and any other legislation in effect from time to time.
2. The Contractor acknowledges that its obligations under the Contract are in addition to any obligations it has under the [Personal Information Protection and Electronic Documents Act](#), S.C. 2000, c. 5, or similar legislation in effect from time to time in any province or territory of Canada. If the Contractor believes that any obligations in the Contract prevent it from meeting its obligations under any of these laws, the Contractor must immediately notify the Contracting Authority of the specific provision of the Contract and the specific obligation under the law with which the Contractor believes it conflicts.

4008 12 (2008-05-12) Disposing of Records and Returning Records to Canada

The Contractor must not dispose of any Record, except as instructed by the Contracting Authority. On request by the Contracting Authority, or once the Work involving the Personal Information is complete, the Contract is complete, or the Contract is terminated, whichever of these comes first, the Contractor must return all Records (including all copies) to the Contracting Authority.

4008 13 (2008-05-12) Legal Requirement to Disclose Personal Information

Before disclosing any of the Personal Information pursuant to any applicable legislation, regulation, or an order of any court, tribunal or administrative body with jurisdiction, the Contractor must immediately notify the Contracting Authority, in order to provide the Contracting Authority with an opportunity to participate in any relevant proceedings.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

4008 14 (2008-05-12) Complaints

Canada and the Contractor each agree to notify the other immediately if a complaint is received under the [Access to Information Act](#) or the [Privacy Act](#) or other relevant legislation regarding the Personal Information. Each Party agrees to provide any necessary information to the other to assist in responding to the complaint and to inform the other immediately of the outcome of that complaint.

4008 15 (2008-05-12) Exception

The obligations set out in these supplemental general conditions do not apply to any Personal Information that is already in the public domain, as long as it did not become part of the public domain as a result of any act or omission of the Contractor or any of its subcontractors, agents, or representatives, or any of their employees.

7.2.3 Intellectual Property Rights

4007 (2010-08-16) Canada to Own Intellectual Property Rights in Foreground apply to and form part of the Contract

7.2.4 Inspection and Acceptance

The Program Authority is the Inspection Authority. All reports, deliverable items, documents, goods and all services rendered under the Contract are subject to inspection by the Inspection Authority or representative. Should any report, document, good or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

7.2.5 Non-Disclosure Agreement

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non Disclosure agreement, attached at Annex E , and provide it to the Contracting Authority before they are given access to information by or on behalf of Canada in connection with the Work.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

7.3 Security Requirement

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

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

7.3.2 Contractor's Site or Premises Requiring Safeguarding Measures

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

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

7.3.2.2 The Company Security Officer (CSO) must ensure through the [Contract Security Program](#) that the Contractor and proposed individuals hold a valid security clearance at the required level.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2021.

7.4.2 Option to Extend the Contract

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

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

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

7.4.3 Termination on Thirty Days Notice

Canada reserves the right to terminate the Contract at any time in whole or in part by giving thirty (30) calendar days written notice to the Contractor.

In the event of such termination, Canada will only pay for costs incurred for services rendered and accepted by Canada up to the date of the termination. Despite any other provision of the Contract, there will be no other costs that will be paid to the Contractor as a result of the termination.

7.4.4 Comprehensive Land Claims Agreements (CLCAs)

The Contract does not include deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to Comprehensive Land Claims Agreements (CLCAs). Any requirements for deliveries of services within locations within Yukon, Northwest Territories, Nunavut, Quebec, or Labrador that are subject to CLCAs will have to form part of a separate contract.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Karen Marcotte
Title: Supply Specialist
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Business and Management Consultation
Address: 10 Wellington Street, Gatineau, QC
Telephone: 613-858-8522
E-mail address: karen.marcotte@pwgsc-tpsgc.gc.ca

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

7.5.2 Program Authority

The Program Authority for the Contract is:

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

Insert, as applicable:

In its absence, the Program Authority is:

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

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

The Program 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 Program Authority; however, the Program Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

7.5.3 Contractor's Representative

(Fill in at time of contract award.)

7.6 Payment

7.6.1 Basis of Payment

7.6.1.1 Firm Unit Price

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid the firm unit price indicated below. Customs duties are including and Applicable Taxes are extra.

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

Period of the Contract (from contract award to Operational Phase before issuing the bid solicitation, insert the applicable dates) :	Work described in Annex A, Statement of Work, to which the basis of payment applies:
A firm unit price of \$ _____ (30%) upon completion of the start-up phase and upon acceptance by the Program authority	Sections 5.0 Start-up Phase Tasks; 6.0 Start-Up phase – Deliverables table;
A firm unit price of \$ _____ (70%) upon successful completion of the test phase and upon acceptance by the Program authority	Sections 5.5.3 Provide Progress Updates and Test Plan; 5.9 Confirm Start-Up Phase Completion and Readiness of Solution;

7.6.2 Method of Payment

Multiple Payments

Canada will pay the Contractor upon completion and delivery in accordance with the payment provisions detailed in section 7.6.1.1 Firm Unit Price of the Contract if:

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

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

Monthly Payments

For the Work described in the Statement of Work in Annex A, Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

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

7.6.3 SACC Manual Clauses

A9116C (2007-11-30), T1204 – Information Reporting by Contractor
A9117C (2007-11-30), Direct Request by Customer Department

7.6.4 Electronic Payment of Invoices - Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instruments:

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

7.6.5 Discretionary Audit

SACC Manual Clause C0705C (2010-01-11), Discretionary Audit

7.7 Invoicing Instructions

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

- a. a copy of time sheets to support the time claimed;
- b. a copy of the release document and any other documents as specified in the Contract;

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

- c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- d. a copy of the monthly progress report.

2. Invoices must be distributed as follows:

- a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
- b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

7.8 Certifications and Additional Information

7.8.1 Compliance

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

7.8.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid List" available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>). The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.9 Applicable Laws

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

7.10 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 supplemental general conditions 2003 (2018-05-22) ;
- (c) the general conditions 2035 (2018-06-21), General Conditions - Higher Complexity - Services;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) Annex D, Insurance Requirements (if applicable); and
- (i) the Contractor's bid dated _____.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

7.11 Foreign Nationals

SACC Manual clause A2001C (2006-06-16), Foreign Nationals (Foreign Contractor)
SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

7.12 Insurance Requirements

The Contractor must comply with the insurance requirements specified in Annex D. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

7.13 Proactive Disclosure of Contracts with Former Public Servants

Insert at contract award text if required

7.14 Government of Canada Web Standards

The Work must comply with the Government of Canada standards established by the Treasury Board, that include the [Standard of Web Accessibility](#), the [Standard on Web Usability](#), the [Standard on Web Interoperability](#), and the [Standard on Optimizing Websites and Applications for Mobile Devices](#).

In addition, the Work must comply with the standards and guidelines developed by the department or agency for whom the Work is being performed. Such standards and guidelines are available from the department or agency's Web Standards Centre of Expertise.

ANNEX A, STATEMENT OF WORK

1.0 TITLE

Specialized service delivery to support the administration of the Memorial Grant Program for First Responders.

2.0 OBJECTIVE

Public Safety Canada (the program authority) requires specialized services to support the design, implementation and administration of the Memorial Grant Program for First Responders (Memorial Grant Program). This statement of work details the services required to support the new Memorial Grant Program.

3.0 BACKGROUND

In keeping with responsibilities and authorities outlined within the *Department of Public Safety and Emergency Preparedness Act*, the Minister has created a grant to strengthen the first responder community in Canada. In recognition of the critical role of first responders in protecting Canadians, the Memorial Grant Program took effect on April 1, 2018.

The Memorial Grant Program provides a new federal tax-free, one-time lump-sum, grant to eligible beneficiaries of firefighters, police officers and paramedics who die as a direct result of their duties. The objective of the grant is to recognize the service and sacrifice of Canada's first responders who die in the line of duty, including deaths resulting from occupational illness and deaths resulting from psychological impairment.

Eligibility requirements for the grant are outlined in the Memorial Grant Program Terms and Conditions and are attached as Appendix A. Assessing applications requires highly specialized expertise that the program authority does not have in-house. The service must be client-centric, sensitive and highly supportive of grieving applicants.

The Memorial Grant Program will benefit from the adjudication expertise, advocacy-based claims management principles and technological innovations found within the insurance, workers' compensation and benefits administration industries. Contracting with an experienced service provider will help the program authority manage the Memorial Grant Program cost-effectively and efficiently.

4.0 SCOPE OF WORK

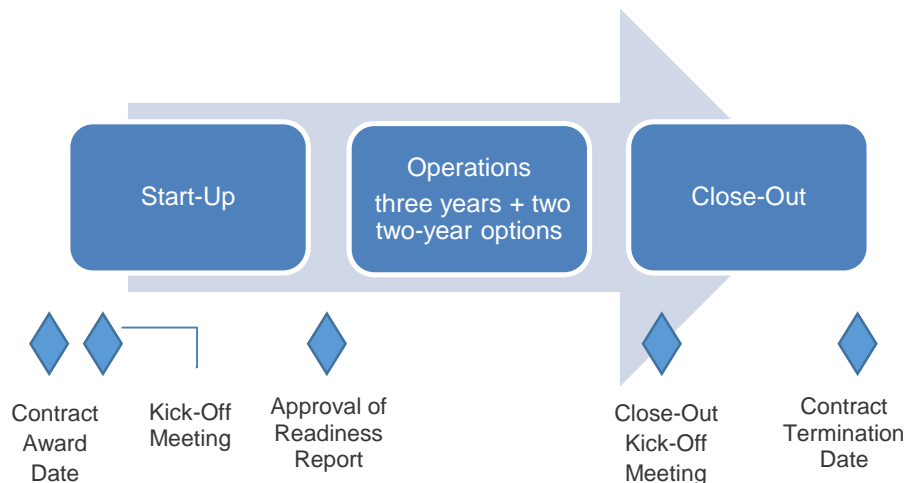
The contractor is responsible for delivering specialized services including the handling of enquiries, assessing applications, and providing eligibility recommendations to the program authority. The program authority is responsible for making eligibility decisions, informing applicants about decisions and making grant payments. The program authority will develop a Policy Manual to guide the contractor in making recommendations regarding grant eligibility.

4.1 Estimates of Annual Eligible Incidents

The Memorial Grant Program is a new program with limited baseline data. Estimates regarding the number of potentially eligible firefighter, police and paramedic incidents are outlined in Appendix B. For planning purposes, the anticipated annual volume of eligible incidents is 72, where potentially half of the deaths may involve psychological impairment. The program authority cannot guarantee this number.

4.2 Service Delivery Phases

Service and deliverables are to be provided in three phases: start-up; operations; and close-out.



5.0 START-UP PHASE TASKS

A key task in the Start-Up Phase is promptly processing the backlog of applicants eligible for assessment received by the program authority between April 1, 2018 and contract award. The broader goals are to develop and implement processes and systems and establish a responsive team to deliver a high quality sensitive service to eligible beneficiaries of fallen first responders. Constant communication with the program authority is required throughout the Start-Up Phase.

5.1 Process Backlog of Applicants Eligible for Assessment

Prior to contract award, the program authority will have tracked some applicants eligible for assessment and encouraged them to gather the information required for assessment. The Memorial Grant Program Terms and Conditions in Appendix A set out eligibility requirements and the kind of documents that are necessary for application.

Within ten days of contract award, the contractor must contact the backlog applicants, obtain informed consent and start to process applications and recommendation packages for the program authority. The priority processing of the backlog of applicants eligible for assessment will have to be started before business processes and an information technology and contact centre solution for the overall service are fully developed and implemented. The approach utilized by the contractor may initially be paper based but must adhere to the personal information handling requirements stipulated by the contracting authority (Public Services and Procurement Canada).

In addition to this priority processing, the contractor will be required to also manually process applications and recommendation packages received after contract award and until the Start-Up Phase is fully implemented, customized and tested. The program authority requires an initial report and weekly updates that summarize the number of applications processed, the numbers of applications remaining, the steps being taken to process the applications and the estimated timeframes for resolving the backlog. The contractor must provide a progress update at each weekly meeting and as part of the Start-Up Phase Weekly Meeting Summary.

5.2 Refine Management Plan for the Protection of Personal Information

A Management Plan for the Protection of Personal Information must provide a comprehensive description of all actions and precautions the contractor will undertake so that its people, systems and processes protect personal information as it is gathered, processed, stored and shared as articulated by the contracting authority. The plan must also certify compliance with the relevant provincial legislation where the contractor operates. The contractor must refine the plan provided in its response to the RFP and can only use a plan that has been approved by the program authority.

5.2.1 Develop Forms for Personal Information Handling and Authorized Representation

The contractor must make forms and scripts that facilitate the handling of personal information. Forms are also needed to facilitate situations where an applicant chooses to be represented by a third party and where the contractor might need to gather information on behalf of the applicant to support the application process.

Consent Form - The program authority requires a consent form to document acknowledgement from an applicant that the contractor is acting as an agent for the program authority and is collecting, processing, storing and sharing personal information for the purpose of assessing applications and for the Minister of Public Safety Canada to make a decision. There must be a clear statement that the applicant understands and agrees that all information provided to the contractor will also be shared with the program authority.

Telephone Script - The contracting authority requires the contractor to develop a script for collecting personal information by telephone.

Authorized Representative Form - The contractor must develop a form for authorizing representation for an applicant that chooses to be represented by a third party. One purpose is so the contractor is notified in writing of the authorization of a representative before such representative interacts with the contractor or has access to any information relating to the application. Another purpose is to provide the necessary authorization for the program authority to disclose and discuss personal information provided by the applicant with that third party and to communicate due diligence requirements and the decisions of the program authority. All authorizations must be signed by the applicant. Unless notified otherwise, the contractor must assume the continuing validity of an authorization. The form must indicate that the onus is on the applicant to notify the contractor if an authorization is cancelled or a new representative is selected.

Authorizing the Contractor as a Representative Form - An additional authorized representation form is required so the contractor can speak for or ask for documents or other evidence on behalf of the applicant. This may be needed so the contractor can support the applicant in getting all the necessary information to complete their application.

5.3 Refine Start-Up Phase Project Plan for Kick-Off Meeting

The contractor must refine the proposed approach provided in its response to the RFP and submit it as the Start-Up Phase Project Plan. This project plan will detail the steps and timeframes to operationalize the proposed approach and must be provided to the program authority for approval. The contractor must present and discuss the plan with the program authority at a Kick-Off Meeting and make any changes required by the program authority.

5.4 Develop and Illustrate Business Processes for the Service

The contractor must fully develop and illustrate business processes, sub-processes, activities and sub-activities it will undertake to provide the service. The business process documents must be provided to the program authority for approval and any changes required by the program authority must be completed by the contractor. At a minimum, the contractor must describe processes, methods and techniques that adhere to the service standards described in Appendix C and must:

Enquiry Handling

- receive and track all enquiries about the Memorial Grant Program and make real-time dashboard indicators available to the program authority regarding the enquiries;
- identify enquiries that do not technically meet the Memorial Grant Program Terms and Conditions in Appendix A (e.g., involve: a date of death earlier than April 1, 2018; the death of an individual clearly not employed nor formally engaged as a police officer, firefighter or paramedic; enquiry is from someone other than an eligible beneficiary);
- communicate ineligibility immediately to enquiring parties, as appropriate, and document this activity in real-time dashboards and monthly reports to the program authority;
- identify enquiries that appear to meet the requirements in the Memorial Grant Program Terms and Conditions in Appendix A and offer these enquiring parties information materials on how to apply to the Memorial Grant Program;

Application Support

- obtain consent and support applicants eligible for assessment through an intake and information gathering process that obtains all required documentation as described in the Memorial Grant Program Terms and Conditions in Appendix A;
- assign a contractor team member for each applicant and minimize turnover;
- engage stakeholder and employer parties to help support applicants eligible for assessment through information gathering and the application process; as appropriate;

Application Assessment

- assess applications and associated documentation for incident eligibility using the Memorial Grant Program Terms and Conditions in Appendix A and obtain expert or specialist medical opinions to inform recommendations, as required;
- identify all eligible beneficiaries per eligible incident according to the Memorial Grant Program Terms and Conditions in Appendix A;
- notify applicants of pending recommendations;
- for negative recommendations, offer an assessment review by a separate senior application assessment specialist, including any new information, and notify applicants of the review findings;

Progress Updates

- keep applicants fully informed of the progress of applications and provide applicants an opportunity to provide any missing documentation;
- inform the program authority about the processing of enquiries and applications with metrics about volume, status, jurisdictional breakdown and narratives about challenges encountered, and opportunities and changes made to enhance the service;
- provide service and performance metrics that enable the program authority to fulfil its Program Evaluation Measures in Appendix D;

Recommendations on Eligibility

- render comprehensive recommendations to the program authority regarding all applications; clearly outlining the documents reviewed and the basis of the recommendations;
- respond to any due diligence inquiries made by the program authority and take action to resolve any outstanding questions or issues in a timely manner; and,
- receive decision and grant payment notifications from the program authority and update dashboard indicators and monthly reports.

5.5 Design and Implement an Information Technology and Contact Centre Solution

The contractor must design and implement an information technology and contact centre solution that supports the administration of the Memorial Grant Program, provides bilingual service, complies with the service standards in Appendix C and follows the business processes approved by the program authority.

5.5.1 Customize for User and Program Authority Needs

The information technology and contact centre solution must be customized by the contractor for the following user needs:

The **public** must be able, in both official languages, to:

- view web information about the Memorial Grant Program;
- call a toll-free number to receive the same information by telephone; or
- interact via regular mail.

Enquiries regarding eligibility must be:

- received by online enquiry, e-mail, telephone, fax or regular mail; and,
- filtered to identify enquiries meeting eligible incident date and first responder definition requirements in the Memorial Grant Program Terms and Conditions in Appendix A.

Applicants must be able to use online electronic means and telephone calls and regular mail in both official languages to:

- provide consent;
- receive detailed information on how to apply for the Memorial Grant Program;
- obtain forms;
- provide required documents;
- validate the information they have provided; and
- track the status of their application.

The **contractor's team members** providing the service must be able to:

- securely view documentation; and,
- make applicant case notes within the system.

The **program authority** must be able to:

- specify data elements and securely access real-time dashboard information and monthly reports regarding enquires, applications, customer satisfaction levels, business process performance and compliance with service standards;
- securely access recommendation packages following assessments and receive other information (e.g., specific data elements) as required to meet due diligence, decision and payment responsibilities;
- notify the contractor of decisions and payment delivery status so applicant progress indicators, real-time dashboards and monthly reports are up to date;
- maintain data integrity and not incur extra expenses when the contractor transitions all records and data to a new service provider; and,
- transfer records and data without being hampered by proprietary formats or license requirements.

5.5.2 Provide Illustrations of the IT and Contact Centre Solution

The contractor must provide illustrations and narratives outlining the information technology and contact centre solution to the program authority. Details are required for approval by the program authority on system architecture, technologies used, potential scalability, data elements, data flows, data storage, reporting and security requirements. The contractor is responsible for any changes required by the program authority.

5.5.3 Provide Progress Updates and Test Plan

The contractor must update the program authority on implementation and customization activities through weekly meetings and reports. Program authority input and lessons learned from processing the backlog of applications will facilitate innovation, customization, implementation and testing.

At eighty-five percent implementation of the information technology and contact centre solution, the contractor must provide a Test Plan to the program authority for approval. The contractor must provide a demonstration of all components and facilitate system access for the program authority. The contractor must continue the implementation, conduct the testing and is responsible for any changes required by the program authority.

5.6 Create Communication and Application Support Materials

Using source documentation provided by the program authority, the contractor must create a series of communication and application support materials. These materials are to fully inform applicants about eligibility criteria, application procedures, application assessments and reviews and the decision making and payment roles of the program authority.

Application forms must be developed that facilitate applicants acquiring and submitting the documents required for application. The forms must respect the different circumstances of incident eligibility (e.g., fatal injury, occupational illness or psychological impairment) and the different documents or evidence that may be required for each kind of application.

All materials developed by the contractor must meet accessibility standards stipulated by the contracting authority, be in both official languages and be available to all regions of the country at all times. The contractor must submit communication and application support materials to the program authority for approval, be responsible for changes required by the program authority, provide version updates at weekly meetings and have materials ready for the Operations Phase.

5.7 Secure Access to Required Specialists

The contractor must assemble a multi-disciplinary team that has a primary contact for the program authority and experts that fully support the administration of the Memorial Grant Program. The contractor's team must be able to deliver quality customer service, in both official languages, when interacting with enquiring parties and applicants. To make certain Memorial Grant Program applications are assessed with integrity and recommendations are thorough, the contractor's team must include Senior Application Assessment Specialists and Expert Medical Consultants.

For the purposes of the Memorial Grant Program, a Senior Application Assessment Specialist must be primarily responsible to assess applications and ensure that recommendations provided to the program authority are clear and thorough. The contractor must have access to a minimum of two Senior Application Assessment Specialists so a separate resource can perform assessment reviews when required. The contractor may require access to additional Senior Application Assessment Specialists in order to meet bilingual service delivery requirements.

The contractor must use and pay for Expert Medical Consultants when applications require additional documents or evidence to establish eligibility. The expert must review documents or evidence required by the Memorial Grant Program Terms and Conditions in Appendix A and must cite current peer-reviewed scientific research articles when recommending if a death is reasonably attributable to the performance of a first responder's duties.

Senior Application Assessment Specialists must have:

- extensive experience determining eligibility for complex benefits/services, or managing a claims team, or adjudicating claims, or adjusting involving serious loss and/or complex claims; (Extensive experience is defined as a minimum of ten years working in the property and casualty or life or disability or health benefits or workers' compensation or other compensation/award programs); and,
- a university degree or related certification or claims adjudication training or adjusting training.

Expert Medical Consultants must have:

- a license to practice medicine in Canada;
- specialty certifications related to the diagnosed occupational disease or diagnosed/presumed psychological impairment; and,
- demonstrable experience in assessing insurance related medical issues and/or providing opinions to insurance, legal or other benefit/service programs.

5.7.1 Refine Human Resources Plan

The contractor must refine the proposed Human Resources Plan provided in its response to the RFP. Skilled resources are needed to: project manage the Start-Up Phase; design, implement, customize and maintain an information technology and contact centre solution; provide sensitive customer service to enquiring parties and applicants; obtain expert medical opinions when needed; assess applications for eligibility; and prepare comprehensive recommendation packages for the program authority. The plan must indicate a project manager contact for the Start-Up Phase and a primary contact for the Operations Phase.

The Human Resources Plan must outline the different categories of human resources being utilized and explain the positions and roles assigned to team members. Relevant skills, abilities and competencies, must be listed, along with any certifications or equivalent experience summaries for each team member. The plan must also describe the contractor's approach to maximizing continuity of service (e.g., minimizing team member changes and reducing absences and turnover). The plan must be approved by the program authority and the contractor is responsible for making any changes required by the program authority.

5.8 Develop and Submit Risk Management Plan

The contractor must conduct an analysis of all risks that could be encountered in each contract phase, assess the probability of each risk, identify mitigation measures and incorporate these into a Risk Management Plan. This plan must be submitted to the program authority for approval. Risk and mitigation strategy updates must be part of Start-Up Phase weekly meetings and the weekly meeting summary reports.

5.9 Confirm Start-Up Phase Completion and Readiness of Solution

When fully implemented, customized and tested, the contractor must submit a Readiness Report verifying that successful testing has been completed and that the contractor is ready to deliver full service and meet all program requirements. The readiness report will provide a clear date to begin the Operations Phase and must be provided to the program authority for approval.

5.10 Start-Up Phase – Deliverable Table

No.	Deliverable	Content	Format(s)	Due Date (# of business days)
1	Priority Processing of the Backlog of Applicants Eligible for Assessment: Initial Report	The Priority Processing Report for the Backlog of Applicants Eligible for Assessment summarizes challenges to processing the backlog of eligible applicants, what steps are being taken and the estimated timeframes for getting the backlog processed.	Secure documents that protect personal information	10 days after contract award
2	Kick-Off Meeting Summary and	The Kick-Off Meeting Summary outlines items discussed in the Kick-Off Meeting and becomes a	Documents (Microsoft Word)	15 days after contract award

Solicitation No. - N° de l'invitation
OD160-183745/C
 Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
423zg.OD160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

No.	Deliverable	Content	Format(s)	Due Date (# of business days)
	Start-Up Phase Project Plan	template for the Start-Up Phase Weekly Meeting Summary. The Start-Up Phase Project Plan details the steps and timeframes to operationalize the Proposed Approach accepted for contract award. The plan outlines all activities and deliverables and is submitted to the program authority for approval. The contractor is responsible for any changes required by the program authority.		
3	Management Plan for the Protection of Personal Information, Consent Forms and Authorized Representative Forms	The Management Plan for the Protection of Personal Information provided by the contractor in its response to the RFP is updated with input from the kick-off meeting. This plan, the consent form, the telephone script and the two authorized representative forms are submitted to the program authority for approval and the contractor is responsible for any changes required by the program authority.	Documents (Microsoft Word)	15 days after contract award
4	Human Resources Plan	The Human Resources Plan proposed by the contractor in its response to the RFP is refined and submitted to the program authority for approval. The contractor is responsible for any changes required by the program authority.	Document (Microsoft Word)	15 days after contract award
5	Start-Up Phase Weekly Meeting Summaries	The Start-Up Phase Weekly Meeting Summary is submitted each week to the program authority. It provides an update on the status of: processing the backlog of applications; risks and opportunities; business process development; implementation progress for the Information Technology and Contact Centre Solution and the creation of communications and application support materials.	Document (Microsoft Word)	One day after each weekly meeting (ongoing)
6	Business Process Modelling and Workflow Descriptions	The illustrations and narratives of business processes, sub processes, activities and sub activities provided by the contractor in its response to the RFP are updated and submitted to the program authority for approval. The	Documents suitable for a senior management audience at Public Safety Canada using modelling notation (Microsoft Office)	30 days after contract award

Solicitation No. - N° de l'invitation
0D160-183745/C
 Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

No.	Deliverable	Content	Format(s)	Due Date (# of business days)
		contractor is responsible for any changes required by the program authority.		
7	Information Technology and Contact Centre Solution: Illustrations and Narratives	The illustrations and narratives detailing the Information Technology and Contact Centre Solution provided by the contractor in their response to the RFP are updated and provided to the program authority for approval. The contractor is responsible for any changes required by the program authority.	Documents and presentations using modelling notation suitable for a senior management audience at Public Safety Canada (Microsoft Office)	30 days after contract award
8	Information Technology and Contact Centre Solution: Test Plan	The Information Technology and Contact Centre Solution: Test Plan signals that 85% implementation has occurred, lists implementation activities and outlines how testing will be conducted. The plan is provided to the program authority for approval. The contractor is responsible for arranging inspection access for the program authority and for any changes required by the program authority.	Document suitable for a senior management audience at Public Safety Canada (Microsoft Office)	60 days after contract award
9	Communication and Application Support Materials	With base information supplied by the program authority, communication and application support materials are developed, approved by the program authority and ready for operational use. Specific deliverables include web-site information and an application form.	Documents as needed in both official languages (Microsoft Office)	As scheduled in the Start-Up Phase Project Plan (ongoing)
10	Risk Management Plan and Weekly Updates	The Risk Management Plan provided by the contractor in its response to the RFP is updated and submitted to the program authority for approval. Weekly updates are discussed with the program authority and included in the Start-Up Phase Weekly Meeting Summaries.	Document (Microsoft Word)	As scheduled in the Start-Up Phase Project Plan (ongoing)
11	Readiness Report	The Readiness Report verifies that successful testing has been completed and the contractor is ready to meet all requirements. A clear date to begin the Operations Phase is provided to the program authority.	Document (Microsoft Word)	As scheduled in the Start-Up Phase Project Plan

6.0 OPERATIONS PHASE TASKS

The contractor must continually review business process performance and present value opportunities to improve customer service to the program authority. When approved, enhancements are to be implemented rapidly. Recommendation packages are critical deliverables in the Operations Phase and ongoing effective communications is necessary through dashboards, reports and meetings.

6.1 Submit Operations Phase Plan

The contractor must create and submit an Operations Phase Plan. The plan will be informed by the lessons learned during the Start-Up Phase and detail all business processes, systems and human resources in place to provide the service in accordance with the service standards in Appendix C. The plan must also include how business processes, information systems and customer service will be reviewed for value opportunities and risk. The contractor must present and discuss the Operations Phase Plan at the Operations Kick-Off Meeting and make any changes required by the program authority.

6.2 Deliver Service According to Approved Business Processes and Service Standards

The contractor must deliver the service following the approved business processes and service standards in Appendix C. The program authority must be notified on the same day by telephone, e-mail and dashboard update of any breaches to the standard and how the contractor is rectifying the matter. When the contractor learns of a dissatisfied applicant, it must inform the program authority on the same day by telephone, e-mail and dashboard updates about the issue, the mitigating actions being taken and about other interventions that are proposed.

6.3 Provide Applicants Access to Progress Indicators

Applicants eligible for assessment must be able to securely view any information they have provided and determine the status of their application via on-line access. Applicants without computer access must be able to verify the information they have provided and be informed about the status of their application by telephone call or regular mail.

6.4 Provide Program Authority Access to Real-Time Dashboards

The contractor must maintain dashboards that visually display enquiry and application processing metrics and make them available to the program authority in real-time. To protect personal information, the dashboard metrics must not contain or reveal any personal information. Volumetric information in the dashboards will be used for planning by the program authority. The dashboards must contain metrics needed by the program authority to monitor how key business processes are performing, to identify bottlenecks and to identify opportunities to enhance the service.

6.5 Provide Reports and Monthly Meeting Summaries

The program authority requires reports to fulfill planning and other program accountabilities. The contractor must provide standalone monthly, quarterly and annual reports that detail web analytics, contact centre activity, enquires, applications, customer satisfaction levels, business process performance and compliance with the service standards described in Appendix C. The reports must be consistent with real-time dashboard information and the contractor must host the reports on its secured system and make electronic copies available to the program authority.

The contractor must meet monthly with the program authority and provide an Operations Phase Monthly Meeting Summary. The summary must focus on overall service performance, value opportunities and risks identified, and propose any service changes for the program authority to consider. The contractor is responsible for any changes required by the program authority.

6.6 Provide Recommendation Packages

Recommendation Packages are critical deliverables. The packages will be produced by the contractor as a result of application assessments and assessment reviews. The contents must be different for positive and negative recommendations. When the recommendation is positive, the recommendation package must contain:

- checklist that all documentation defined in the Memorial Grant Program Terms and Conditions in Appendix A has been obtained, is complete and signed;
- copy of the applicant's consent to share personal information with the program authority;
- list of authorized representatives and their addresses (if any); and,
- narrative about how the application meets the Memorial Grant Program Terms and Conditions in Appendix A and detailed information about how the application meets the requirements in Sections 2, Section 5, Section 6 and Section 11.

The package for a negative recommendation must contain the above with a different and more detailed narrative. A negative recommendation package narrative must identify the Terms and Conditions that are not met by the applicant. The narrative must include the facts involved and describe additional efforts taken to consider other documents, evidence, medical opinion and the results of any assessment review before arriving at a negative assessment recommendation.

The contractor must assist the program authority in reviewing the recommendation package and completing required due diligence (e.g., assessment reviews or written clarifications). When the program authority renders a decision, the contractor must provide additional data elements to it in order to process the payment.

6.7 Maintain Communication and Application Support Materials

The contractor must maintain a series of communication and application support materials in both official languages that fully inform applicants about eligibility criteria, application procedures, application assessment, assessment reviews and the decision making role of the program authority. Based on enquiry handling and application support, the contractor may propose changes to these materials in the Operations Phase Monthly Meeting Summaries. The contractor is responsible for changes as required by the program authority, including to website information.

6.8 Maintain Information Technology and Contact Centre Solution

The contractor must maintain the information technology and contact centre solution supporting the administration of the Memorial Grant Program, providing bilingual service, complying with the service standards in Appendix C and following the business processes approved by the program authority. The Operations Phase Monthly Meeting Summary must include operational and service metrics of the Information Technology and Contact Centre Solution (e.g., web analytics, solution utilization, average uptime and user satisfaction).

6.9 Facilitate Reviews Required by Program Authority

The program authority may periodically review case files to better understand how the contractor is delivering the service. The intent is to review files, systems, processes and have discussions with contractor team members about various enquiries, applications and recommendations. Within five days of program authority request, the contractor must provide access to its premises, relevant systems, and files for the purposes of a case review.

6.10 Operations Phase – Deliverable Table

No.	Deliverable	Content	Format(s)	Due Date (# of business days)
1	Operations Phase: Kick-Off Meeting Summary and Plan	The Operations Kick-Off Meeting Summary outlines items discussed in the Operations Kick-Off Meeting and becomes a template for the Operations Phase Monthly Meeting Summary. The Operations Phase Plan is based on the proposed approach the contractor provided in response to the RFP and updated with lessons learned from the Start-Up Phase. The plan outlines all activities and deliverables and is submitted to the program authority for approval. The contractor is responsible for any changes required by the program authority.	Document (Microsoft Word)	10 days prior to start of Operations Phase
2	Service Delivery	Service delivery according to the business processes approved in the Start-Up Phase and the service standards in Appendix C.	Sensitive customer service to all enquires and applicants	Ongoing
3	Notification of Service Standard Breach or Dissatisfied Applicant	The contractor informs the program authority about a service standard breach or a dissatisfied applicant and the mitigating actions being taken and other proposed interventions.	Telephone call, e-mail and dashboard	Same day (ongoing)
4	Applicant Access to Progress Indicators	Application progress indicators are available to applicants as described in the Start-Up Phase and Operations Phase tasks.	On-line data visualizations, documents (Microsoft Office) and available by telephone	10 days after start of Operations Phase (ongoing)
5	Program Authority Access to Real-Time Dashboards	Real-time dashboards are available to the program authority as described in the Start-Up Phase and Operations Phase tasks.	On-line data visualizations and documents (Microsoft Office)	10 days after start of Operations Phase (ongoing)
6	Recommendation Packages	Recommendation packages provided to the program authority include: evidence of consent; authorized representative(s), detailed narrative; facts; and a list of documents referenced.	Secure document	Two days after each application assessment or assessment review is completed (ongoing)
7	Data Elements for Grant Payment	Once the program authority has completed due diligence and rendered a decision; additional data	Data elements sent electronically	Two days after contractor is notified of due

Solicitation No. - N° de l'invitation
0D160-183745/C
 Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

No.	Deliverable	Content	Format(s)	Due Date (# of business days)
		elements are sent to the program authority to enable payment.		diligence and decision (ongoing)
8	Reports	Reports (monthly, quarterly and annual) and the Operations Phase Monthly Meeting Summary are described in Section 6.5 of the SOW.	Documents with clear informative graphics suitable for a senior management audience (Microsoft Office)	As required by the program authority (ongoing)
9	Communication and Application Support Materials Maintenance	The contractor maintains communication and application support materials in both official languages, proposes enhancements in the Operations Phase Monthly Meeting Summaries and is responsible for changes as required by the program authority, including websites forms and documents.	Updates in Operations Phase Monthly Meeting Summary (Microsoft Word)	Monthly updates (ongoing)
10	Information Technology and Contact Centre Maintenance	The contractor maintains the information technology and contact centre solution in both official languages according to service standards in Appendix C and updates the Operations Phase Monthly Meeting Summary with operational and service metrics.	Updates in Operations Phase Monthly Meeting Summary (Microsoft Word)	Monthly updates (ongoing)
11	Facilitate Case Review	The contractor must provide the program authority access to files, systems, processes and team members for the purposes of case reviews.	Document agreeing to provide access and the provision of access (Microsoft Word)	Within five days of a request by the program authority (ongoing)

7.0 CLOSE-OUT PHASE TASKS

The primary goal of the Close-Out Phase is to maintain quality service and transition to a new service provider. The Close-Out Phase starts upon formal written notification from Public Services and Procurement Canada to the contractor and ends on the termination date of the contract. The duration for the Close-Out Phase is no more than forty business days after written notification.

7.1 Submit Close-Out Phase Project Plan and Kick-Off Meeting

The contractor must create a Close-Out Phase Project Plan within ten days after written notification. The plan will detail the steps and timeframes to execute the tasks required in the Close-Out Phase. The contractor must submit the Close-Out Phase Project Plan to the program authority for approval, discuss the plan at the Close-Out Phase Kick-Off Meeting and make any changes required by the program authority.

7.2 Continue Service to Applicants Eligible for Assessment

The contractor must continue to process the applications received before the start of the Close-Out Phase. For those applications, the contractor must continue to provide application support services, application assessments, assessment reviews, recommendations and maintenance of the information technology and contact centre solution according to the service standards in Appendix C.

7.3 Handle Enquiries but Refer Applicants Eligible for Assessment Elsewhere

During the Close-Out Phase, the contractor must continue to handle general enquires but refer any new applicants eligible for assessment to the program authority or new service provider. More details will be provided by the program authority during the Close-Out Phase Kick-Off Meeting.

7.4 Provide Close-Out Phase Weekly Meeting Summaries

The contractor must meet with the program authority on a weekly basis to update on close-out phase progress. The contractor must provide a summary after each meeting to inform the program authority including the processing progress of the application inventory and the preparations for application and record transfer.

7.5 Prepare Applications for Transition

Any applications in inventory that are not ready for assessment at five days before the termination date must be prepared for transition. The contractor must inform each applicant in writing that their file is being transitioned and make clear that personal information will continue to be handled according to the procedures in the consent forms. The contractor must prepare a written summary of each application file being transitioned including remarks about: present status; last contact; outstanding items or actions; and suggested next steps. The written summary and records must then be provided to the program authority or new service provider. More details will be provided by the program authority during the Close-Out Phase Kick-Off Meeting.

7.6 Transfer Records and Data

The contractor must segregate all records and data by each Memorial Grant Program application and prepare for transfer to the program authority or new service provider. Format and technique details that the contractor must follow will be provided by the program authority at the Close-Out Phase Kick-Off Meeting. The contractor must transfer all information to a new service provider and the transfer feasibility must not be hampered by proprietary formats or license requirements. The contractor must provide the program authority a brief report on the data and data structures involved and must confirm the successful transfer to the new service provider. The program authority will verify the effectiveness of the transfer with

the new service provider and the contractor is responsible for any additional tasks required to transfer the records and data completely.

7.7 Update Communications Materials

The contractor must update communications materials such as websites, landing pages and forms to highlight Close-Out Phase changes and the pending transition to the program authority or new service provider. The program authority must approve all changes to the communications materials.

7.8 Close-Out Phase - Deliverable Table

No.	Deliverable	Content	Format	Due Date (# of business days)
1	Close-Out Phase Kick Off Meeting and Close-Out Phase Project Plan	The plan details steps and timeframes to execute the tasks required in the Close-Out Phase.	Document (Microsoft Word)	Five days after start of Close-Out Phase
2	Close-Out Phase Weekly Meeting Summaries	Close-Out Phase Weekly Meeting Summary - processing progress for the application inventory and preparations for the transfer of applications and records.	Document (Microsoft Word)	One day after each weekly meeting (ongoing)
3	Communications Material Update	Summary of communications material that has been updated.	Document (Microsoft Word)	15 days after Close-Out Phase start
4	Data Summary and Transfer Confirmation	Summary of the data, data structures and confirmation of their successful transfer.	Document (Microsoft Word)	Within five days of contract termination date

8.0 CONSTRAINTS AND ASSUMPTIONS

8.1 Location

All work must be completed at the contractor's facilities.

8.2 Meetings and Travel

The contractor is responsible for any travel costs associated with attending meetings. No other travel is anticipated for this work.

8.3 Varying Volumetrics

In the event of any increase in the anticipated number of applications, the contractor must process the overage as per the service standards in Appendix C and within the basis of payment agreed to in the contract.

8.4 Policy Manual

A policy manual will be produced by Public Safety Canada to help guide application assessments by the contractor.

APPENDIX A - MEMORIAL GRANT PROGRAM TERMS AND CONDITIONS

1. Authorities

Under section 4(1) of the *Department of Public Safety and Emergency Preparedness Act*, the powers, duties and functions of the Minister extend to and include all matters over which Parliament has jurisdiction — and that have not been assigned by law to another department, board or agency of the Government of Canada — relating to public safety and emergency preparedness. Under section 4(2) the Minister is also responsible for exercising leadership at the national level relating to public safety and emergency preparedness.

Under paragraphs 6(1) (a) and (c), the Minister, in exercising his or her powers and in performing his or her duties and functions and with due regard to the powers conferred on the provinces and territories, may initiate, recommend, coordinate, implement or promote policies, programs or projects relating to public safety and emergency preparedness; and may make grants or contributions.

Combined, these authorities generally enable the Minister to provide programs such as the Memorial Grant Program for First Responders and other grants or contributions within Public Safety Canada.

2. Definitions

These terms and conditions apply in relation to a First Responder residing in a Province or Territory that has signed a Memorandum of Agreement in respect of this Memorial Grant with Canada.

For the purposes of this Memorial Grant Program, the following definitions apply to these terms and conditions:

First Responder: An individual who was employed or formally engaged to carry out the duties of a police officer, firefighter, or paramedic by a Canadian emergency service in Canada.

Police Officer: An individual who was employed or formally engaged as a volunteer, auxiliary or reservist by a provincial, territorial, regional, municipal or indigenous police service to perform duties that protect the public; detect, prevent or investigate crime; or perform other policing activities. This may also include those who plan, organize, direct, and control police force administration and police activities. At the federal level, this includes the following individuals in respect of the officers and members of the Royal Canadian Mounted Police commonly known as:

- Regular Members;
- Community Constables;
- Reserve Constables;
- Auxiliary Constables; and
- Supernumerary Special Constables.

Firefighter: An individual who was employed or formally engaged as a volunteer, auxiliary or reservist by a provincial, territorial, regional, municipal or indigenous fire service to perform firefighting, fire prevention activities, and assist in other emergencies. This may also include those who plan, organize, direct, and control firefighting operations and fire prevention activities.

Paramedic: An individual who was employed or formally engaged as a volunteer, auxiliary or reservist by a provincial, territorial, regional, municipal or indigenous paramedic or ambulance service to perform duties related to the administration of pre-hospital emergency medical care to patients with injuries or medical illnesses, including transportation to hospitals or other medical facilities for further

emergency medical care. A paramedic may also be known as an emergency medical attendant (EMA), emergency medical technician (EMT), and ambulance attendant.

Eligible beneficiaries: An individual who is able to demonstrate and provides evidence of relationship to a deceased first responder as described below. Eligible beneficiaries are to be determined and paid in accordance with the following descending order of priority:

- i. the spouse or common-law partner as the case may be; or
- ii. if there is no surviving spouse or common-law partners, to a surviving child or children divided in equal amounts; or
- iii. if there is no surviving child, to a surviving parent or parents divided in equal amounts, or
- iv. if there is no surviving parent, to surviving brothers and sisters divided in equal amounts; or
- v. if there is no surviving brothers or sisters, to the deceased's estate.

3. Objectives

The objective of this Memorial Grant is to recognize the service and sacrifice of Canada's first responders as defined above whose deaths are attributable to their duties, including deaths resulting from occupational illness or psychological impairment (i.e., suicide), while keeping Canadians safe.

4. Key Expected Results and Indicators

As an acknowledgement of the critical role that first responders play in protecting Canadians, the Memorial Grant for First Responders is intended to recognize the service and sacrifice of Canada's first responders, resulting in a well-supported community of first responders and their families.

The program contributes to the achievement of departmental and governmental objectives by contributing to enhanced public safety, ultimately leading to a safe and resilient Canada. The program aligns with section 1.3.2, Law Enforcement Leadership of Public Safety Canada's Program Activity Architecture, which provides leadership to Canada's law enforcement community.

The Performance Measurement Strategy for this program outlines a plan that will be implemented by the Department to ensure that there is sufficient performance information available to effectively plan, monitor, and report on results throughout the delivery of the Program, and to effectively support evaluation of the Program.

Output(s)/Outcome(s)	Performance Indicator(s)
Stakeholders are aware of the Memorial Grant Program for First Responders (i.e. eligibility criteria)	<ul style="list-style-type: none">percentage of stakeholders who indicate program awarenessnumber of website page views to the Memorial Grant Program for First Responders webpagepercentage of eligible applicants who apply for the Memorial Grant Program
Well-managed and well established Memorial Grant Program for First Responders responsive to stakeholders needs	<ul style="list-style-type: none">elapsed time from submission of a completed application and decisionelapsed time from receipt of a decision at Public Safety Canada to payment and/or notificationpercentage of total expenditures directed to the administration of the programpercentage of favourable decisions and/or rejections made without requesting a level of review or appeal

Well-supported community of first responders and their families	<ul style="list-style-type: none">percentage of first responders and/or their families perceive the Memorial Grant Program positivelypercentage of stakeholder groups who perceive the Memorial Grant Program positively
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5. Eligible Recipients and Criteria

Eligible recipients must be an “eligible beneficiary” as defined in these terms and conditions and the death of the first responder must meet all of the following incident eligibility criteria.

Incident Eligibility

For the purposes of this Memorial Grant Program for First Responders, death must be attributable to, and resulting from the performance of duties in the following circumstances:

- Death resulting from a fatal injury (e.g., gunshot wound, stabbing, car accident, etc.) while actively engaged in the duties of a first responder in Canada
- Death resulting from an occupational illness primarily resulting from employment as a first responder (e.g., lung cancer, leukemia, non-Hodgkin's Lymphoma, heart injury or other illness). Following established provincial and territorial practices; a presumptive list of occupational illnesses and related years of service will be established and maintained by Public Safety Canada based on current scientific evidence.
- Death resulting from or reasonably attributable to psychological impairment, specifically suicide, based on a pre-existing diagnosis or multiple separate affidavits, as stipulated in Section 11.

The date of death must be on or after April 1, 2018.

The Memorial Grant will not be paid in the following situations:

- If the fatal injury was caused by the intentional misconduct of the first responder or the deceased's intention to bring about their death, except in cases of psychological impairment (i.e., suicide);
- If the first responder was voluntarily impaired at the time of their fatal injury, except in cases of psychological impairment (i.e., suicide); or
- If the first responder was not performing their duties in good faith at the time of their fatal injury.

6. Eligible Activities

The Memorial Grant for First Responders is intended to recognize the service and sacrifice of Canada's first responders in keeping Canadians safe. The Memorial Grant may be payable following signature by a Province or Territory of a Memorandum of Agreement with Canada, submission of a properly completed application and a determination that:

- The applicant is considered to be an *eligible beneficiary* of a *first responder* as described above; and
- The death of the first responder must be *attributable to and resulting from the performance of their duties*.

7. Eligible Expenditures

Upon receipt of the Memorial Grant amount, the eligible beneficiary [ies] may incur any expenditure that they determine will appropriately recognize the service and sacrifice of the deceased first responder.

8. Maximum Amount

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

The maximum amount payable to any eligible Memorial Grant recipient(s) will be a one-time, lump sum of \$300,000 per death. In instances when the Memorial Grant would be divided amongst multiple recipients in equal amounts, the total amount paid out would not exceed \$300,000 (e.g., two eligible surviving children would receive \$150,000 each).

9. Method for Determining Funding Amount

Upon determination of eligibility, the eligible beneficiary [ies] will receive a one-time, lump sum payment of \$300,000. If there are multiple eligible beneficiaries, as stipulated in section 8, the amount will be divided amongst all eligible beneficiaries in equal amounts.

10. Stacking

As Public Safety Canada is the only federal department offering this Memorial Grant in recognition of the service and sacrifice of Canada's first responders, the stacking limit for this program is 100%.

11. Application Requirements

Every application for the Memorial Grant must include documentary evidence that establishes:

- the identity of the deceased First responder;
- the identity of the applicant;
- the relationship between the deceased first responder and the applicant (e.g., marriage certificate, birth certificate, divorce certificates, adoption certificates, affidavits, statutory declarations and any other similar documents as may be required to determine eligibility); and
- A court certified copy of the Will, letters of administration or other similar documentation, as may be required if there is no eligible beneficiary for the purposes of the Memorial Grant.

For death resulting from **fatal injury**, the application must include, in addition to the above:

- A duly completed application form
- Attestation from an authority authorized to represent the employer organization that attests and confirms that the individual was employed or formally engaged by the police, paramedic or firefighting service to perform functions and acted in an official capacity at the time the fatal injury occurred, including a description of the circumstances of the fatal injury;
- Medical records or other records that document the first responder's injury, including the primary cause of death and other contributing factors;
- Certified true copy of the death certificate and,
- Other documents or evidence as may be required to confirm eligibility.

For death resulting from **occupational illness**, the application must include in addition to the above:

- A duly completed application form
- Attestation from an authority authorized to represent the employer organization that attests and confirms the length of time that the individual was employed or formally engaged by the police, paramedic or firefighting service,
- Medical records or other records that document the first responder's disease and diagnosis;
- Medical reports or other records that document the primary cause of death and other contributing factors;
- Certified true copy of the death certificate; and,
- Other documents or evidence as may be required to confirm eligibility.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

For death resulting from **psychological impairment**, the application must include in addition to the above:

- A duly completed application form
- Attestation from an authority authorized to represent the employer organization that attests and confirms that the individual was employed or formally engaged by the police, paramedic or firefighting service to perform functions and acted in an official capacity
- Medical records or other records that document the first responder's pre-existing diagnosis of an operational stress injury due to their engagement and/or employment as a first responder;
- In the absence of a pre-existing diagnosis, multiple separate affidavits from family members living in the same household, friends, employer and/or colleagues attesting to the perceived mental state of the first responder;
- Certified true copy of the death certificate; and,
- Other documents or evidence as may be required to establish eligibility.

12. Official Languages

The Program will comply with all applicable requirements stipulated in the *Official Languages Act* and related regulations, as well as federal policies in this regard, including Chapter 4-1 of the Official Languages Policy.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

APPENDIX B - ESTIMATES OF ANNUAL ELIGIBLE INCIDENTS

Estimates included in this RFP have been provided to potential contractors as background information to assist them in preparing bids. The inclusion of these estimates does not represent a commitment by the program authority that future volumetrics will be consistent with this data.

Data on Reported Line of Duty Deaths of Canadian Public Safety Officers by Class (2010-2014)

First Responder	Number of First Responders in Canada	Number of Deaths (in the line of duty)
Police	78,455 (Census 2017)	Average: 21 per year (includes 14 suicides)
Firefighters; Fire chiefs and Senior Firefighting officers	115,255 (35,255 Career (Census 2017); 80,000 Volunteer*)	Average: 37 per year (includes 7 suicides)
Ambulance attendants and other paramedical occupations	27,625 (Census 2017)	Average: 14 per year (includes 13 suicides)
TOTAL:	221,335	Total: 72

*Data provided by the International Association of Firefighters (IAFF) Canada

APPENDIX C - SERVICE STANDARDS

Overview

The contractor is required to implement the service standards listed in this Appendix. All services, interactions and communications must be provided in both official languages.

ITEM	DESCRIPTION	SERVICE STANDARD (# of business days)	PERFORMANCE MEASUREMENT (% of time)
Applications: Support and Assessment	Preliminary review and filter of enquiries against technical eligibility requirements of the Memorial Grant Program Terms and Conditions.	One day after enquiry	90%
	Communication to enquiring parties not meeting technical eligibility requirements.	Two days after enquiry	90%
	Communication to enquiring parties where further action is required.	Two days after enquiry	90%
	Provision of application form, other application support materials and scheduling of further interactions with applicants eligible for assessment. Assignment of a contractor team member for an applicant.	Two days after enquiry	90%
	Once all information is received, application assessments are completed and applicants are informed of the recommendation and the due diligence and decision roles of the program authority. If negative, an offer of an assessment review is made.	10 days after all application documents and requirements are met	90%
	After an assessment review has been accepted by an applicant and is scheduled, an assessment review is completed and the applicant is informed of the recommendation and the due diligence and decision roles of the program authority.	Five days after the scheduled assessment review	90%
	Recommendation packages are sent to the program authority.	Two days after positive application assessment or assessment review	90%
Contact Centre	Hours of telephone and email response operation are Monday to Friday (8:00 am – 8:00 pm EST), excluding observed federal statutory holidays and uncontrollable events (e.g., power failures, natural disasters).	-	99%
	Services provided in the official language of choice of the enquiring party or applicant.	-	100%
	Telephone contact is answered within 30 seconds or by an automated message which places the caller in queue.	-	90%

Solicitation No. - N° de l'invitation
0D160-183745/C
 Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
 File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
 CCC No./N° CCC - FMS No./N° VME

ITEM	DESCRIPTION	SERVICE STANDARD (# of business days)	PERFORMANCE MEASUREMENT (% of time)
	Number of monthly abandoned calls is less than 5% of the total number of incoming calls.	-	<5%
	Email contact is answered within one hour by a contractor team member.	-	90%
	Contact from applicant(s) or authorized representative(s) are responded to by the assigned contractor team member.	One day after applicant or authorized representative makes contact	90%
Information Technology	Web-site and information technology systems available 24 hours a day, 365 days a year.	-	97%
	Interruptions restored within 72 hours of any uncontrollable incident.	Three days after interruption	97%
	Content updates applied to websites.	10 days after program authority requirement or approval	100%
Case Review	Program authority receives access to files, systems, processes and contractor team members for the purposes of case reviews.	Five days after notification of requirement	100%

APPENDIX D - PUBLIC SAFETY CANADA PROGRAM EVALUATION MEASURES

The performance measurement strategy for this program outlines a plan that will be implemented by Public Safety Canada to ensure that there is sufficient performance information available to effectively plan, monitor, and report on results throughout the delivery of the program, and to effectively support its evaluation. These measures are intended to aid the contractor's understanding of the program's deliverables, and how their approach to the service could have a direct impact on results.

Output(s)/Outcome(s)	Performance Indicator(s)
Stakeholders are aware of the Memorial Grant Program for First Responders (i.e., eligibility criteria)	<ul style="list-style-type: none"> percentage of stakeholders who indicate program awareness number of website page views to the Memorial Grant Program for First Responders webpage percentage of eligible applicants who apply for the Memorial Grant Program
Well-managed and well established Memorial Grant Program for First Responders responsive to stakeholders needs	<ul style="list-style-type: none"> elapsed time from submission of a completed application claim and decision elapsed time from receipt of a decision at Public Safety Canada to payment and/or notification percentage of total expenditures directed to the administration of the program percentage of favourable decisions and/or rejections made without requesting a level of review or appeal
Well-supported community of first responders and their families	<ul style="list-style-type: none"> percentage of first responders and/or their families perceive the Memorial Grant Program positively percentage of stakeholder groups who perceive the Memorial Grant Program positively

APPENDIX E - DEFINED TERMS

Adjudication	The term adjudication, in relation to contractor activities, means the review of eligibility requirements in accordance with the Memorial Grant Program Terms and Conditions in Appendix A to render a recommendation relating to eligibility. The authority to make eligibility decisions and to make payments rests solely with the program authority.
Applicant Eligible for Assessment	One or more applicants are eligible for assessment when the related deceased first responder and his/her date of death meet the technical eligibility requirements of the Memorial Grant Program Terms and Conditions in Appendix A.
Application	A request by an applicant eligible for assessment to request payment under the Memorial Grant Program.
Application Form	The form that sets out application requirements, including supporting documentation, as outlined in the Memorial Grant Program Terms and Conditions in Appendix A.
Authorized Representative	An authorized representative refers to one or more persons, firms or organizations that have written consent from an applicant eligible for assessment to act on their behalf throughout the grant application process. Such representatives include, but are not limited to: <ul style="list-style-type: none"> • lawyers; • paralegals; • union or bargaining agent representatives; • MP office staff; and • aboriginal court workers.
Backlog of Applicants Eligible for Assessment	Unassessed applications from April 1, 2018, to the contract award date, as identified by the program authority.
Contracting Authority	The contracting authority for the Memorial Grant Program is Public Services and Procurement Canada.
Contractor	Contractor refers to a person or entity (or, in the case of a joint venture, the persons or entities) submitting a bid to perform a contract for goods, services or both. It also includes the parent, subsidiaries or other affiliates of the bidder, its subcontractors and association of entities*. *An "association of entities" means separate legal entities within a formally organized professional services network, where all members of the network operate using a common brand, with shared access to intellectual property and talent resources and integrated technology, methodology, strategies and policies across the network.
Enquiry	An enquiry is a query about the Memorial Grant Program from an individual or organization that does not meet the technical requirements of Memorial Grant Program eligibility and is not an Applicant Eligible for Assessment.
Memorial Grant Program for First Responders	The Memorial Grant Program for First Responders is a grant to an eligible applicant relating to a work related death of a firefighter, police officer or paramedic as defined in the program's Terms and Conditions in Appendix A.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

Memorial Grant Program	The short form of the Memorial Grant Program for First Responders.
Program Authority	The program authority for the Memorial Grant Program is Public Safety Canada.
Record	A record is defined as any information obtained or created by the contractor or by the program authority to administer the Memorial Grant Program.
Service	The sum of all activities provided by the contractor to administer the Memorial Grant Program on behalf of the program authority.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ANNEX B, BASIS OF PAYMENT

A- Contract Period (From Contract Award to March 31, 2021)

During the period of the Contract, for Work performed in accordance with the Contract, the Contractor will be paid as specified below.

1.0 PROFESSIONAL FEES

The Contractor will be paid all-inclusive fixed Monthly Fees as follows:

Professional Fees	FIRM ALL-INCLUSIVE MONTHLY FEE (in \$CDN)
Year 1: from Contract Award to March 31, 2019	\$ _____
Year 2: from April 01, 2019 to March 31, 2020	\$ _____
Year 3: from April 01, 2020 to March 31, 2021	\$ _____

1.1 START-UP AND TEST PHASE FEES – FROM CONTRACT AWARD TO OPERATIONAL PHASE (no longer than six months)

CATEGORY	FIRM ALL-INCLUSIVE UNIT PRICE (in \$CDN)
Start-up Fees	\$ _____
Test Phase fees	\$ _____

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

1

1.2 PAYMENT FOR THE DISPOSITION OF THE INVENTORY OF ELIGIBLE APPLICATIONS

The Contractor is eligible for a payment of \$75,000.00 to retire the inventory of Eligible Application (as defined in Section 5.1 Process Backlog of Applicants of the Statement of Work (SOW)). An Eligible Application will be considered retired from the inventory after a recommendation package is received and successfully passes PS's Memorial Grant Program's due diligence process. (For information purposes, a total of 8 Eligible Applications have been received as of July 06, 2018)

The Contractor will receive a payment of \$75,000.00 in two parts:

- i. A firm unit price of \$37,500.00 is payable when 50% of the Inventory of the Backlog of Applicants Eligible for Assessment, as defined in Section 5.1 of the Statement of Work, has been retired and upon acceptance by the Program Authority.
- ii. A firm unit price of \$37,500.00 is payable when the final 50% of the inventory of the Backlog of Applicants Eligible for Assessment has been retired and upon acceptance by the Program Authority.

2.0 Total Estimated Cost- Contract Period: \$ _____ (insert amount at contract award)

B- Option to Extend the Term of the Contract

This section is only applicable if the option to extend the Contract is exercised by Canada.

During the extended period of the Contract specified below, the Contractor will be paid as specified below to perform all the Work in relation to the Contract extension.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

B-1 Extended Contract Period (Year 1: April 01, 2021 to March 31, 2023)

Professional Fees

The Contractor will be paid all-inclusive fixed Monthly Fees as follows:

OPTIONAL CONTRACT PERIOD YEAR		
	PERIOD	FIRM ALL-INCLUSIVE MONTHLY FEES (in \$CDN)
	Year 1: April 01, 2021 to March 31, 2023	\$ _____

B-2 Extended Contract Period (Year 2: April 01, 2023 to March 31, 2025)

Professional Fees

The Contractor will be paid all-inclusive fixed Monthly Fees as follows:

OPTIONAL CONTRACT PERIOD YEAR		
	PERIOD	FIRM ALL-INCLUSIVE MONTHLY FEES (in \$CDN)
	Year 2: April 01, 2021 to March 31, 2023	\$ _____

Solicitation No. - N° de l'invitation
OD160-183745/C
Client Ref. No. - N° de réf. du client
OD160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.OD160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ANNEX C, SECURITY REQUIREMENTS CHECK LIST

ANNEX D, INSURANCE REQUIREMENTS

A- Errors and Omissions Liability Insurance

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$2,000,000 per loss and in the annual aggregate, inclusive of defence costs.
2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
3. The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation

B- Commercial General Liability Insurance

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - a. Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - b. Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - c. Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - d. Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - e. Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - f. Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - g. Employees and, if applicable, Volunteers must be included as Additional Insured.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

- h. Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
- i. Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
- j. Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- k. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.
- l. Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.
- m. Advertising Injury: While not limited to, the endorsement must include coverage piracy or misappropriation of ideas, or infringement of copyright, trademark, title or slogan.
- n. Litigation Rights: Pursuant to subsection 5(d) of the [Department of Justice Act](#), S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

*Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8*

For other provinces and territories, send to:

*Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8*

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

Solicitation No. - N° de l'invitation
0D160-183745/C
Client Ref. No. - N° de réf. du client
0D160-183745

Amd. No. - N° de la modif.
File No. - N° du dossier
423zg.0D160-183745

Buyer ID - Id de l'acheteur
423ZG
CCC No./N° CCC - FMS No./N° VME

ANNEX E, NON-DISCLOSURE AGREEMENT

I, _____, recognize that in the course of my work as an employee or subcontractor of _____, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. 0D160-183745/001/ZG between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and Public Safety Canada, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: 0D160-183745/001/ZG

Signature

Date



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 Public Safety Canada		2. Branch or Directorate / Direction générale ou Direction CSCCB / Strategic Policing Policy
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Public Safety Canada has a requirement for adjudication and IT services to support the implementation and administration of the Memorial Grant Program for First Responders. As part of its duties, the third party service provider will be responsible to receive, process and store personal information from applicants, and share personal information with the program authority as required.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non <input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non <input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/> 483	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"/> 46	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET 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"/>



PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? ☒ No ☐ Yes
Non Oui

If Yes, indicate the level of sensitivity:

Dans l'affirmative, indiquer le niveau de sensibilité :

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? ☒ No ☐ Yes
Non Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :

Document Number / Numéro du document :

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

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



RELIABILITY STATUS
COTE DE FIABILITÉ



CONFIDENTIAL
CONFIDENTIEL



SECRET
SECRET



TOP SECRET
TRÈS SECRET



TOP SECRET- SIGINT
TRÈS SECRET - SIGINT



NATO CONFIDENTIAL
NATO CONFIDENTIEL



NATO SECRET
NATO SECRET



COSMIC TOP SECRET
COSMIC TRÈS SECRET



SITE ACCESS
ACCÈS AUX EMPLACEMENTS

Special comments:

Commentaires spéciaux :

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? ☒ No ☐ Yes
Non Oui

If Yes, will unscreened personnel be escorted?

Dans l'affirmative, le personnel en question sera-t-il escorté?



No
Non

Yes
Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

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



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

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

☒ No
Non

☐ Yes
Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).

Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).