



**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

Title - Sujet POR - Qualitative Research	
Solicitation No. - N° de l'invitation 51019-181009/A	Date 2018-11-09
Client Reference No. - N° de référence du client 51019-18-1009	
GETS Reference No. - N° de référence de SEAG PW-\$\$CY-021-75810	
File No. - N° de dossier cy021.51019-181009	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2018-12-03	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Amaral, Paola	Buyer Id - Id de l'acheteur cy021
Telephone No. - N° de téléphone (613) 998-8588 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF VETERANS AFFAIRS 161 GRAFTON ST P.O.BOX 7700 1B 305 Attn: Nicole Hyndman CHARLOTTETOWN Prince Edward Island C1A8M9 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address

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

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication

360 Albert St./ 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

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

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

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cy021
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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes include the Statement of Work, the Basis of Payment, the Evaluation Criteria, the Security Requirements Checklist, the IT Security Guide, the Electronic Payment Instruments, the Politically Neutrality Certification and the Public Opinion Research Final Report Checklist.

1.2 Summary

Public Works and Government Services Canada (PWGSC), on behalf of Veteran Affairs Canada (VAC), is looking for a supplier to conduct a qualitative study to explore the VAC National Survey 2017 findings for the Rehabilitation Services and Vocational Assistance Program (hereinafter referred to as the "Rehabilitation Program") and Case Management Services. The findings of this study will be used to increase VAC's understanding of clients' experiences with these programs/services, inform the development of survey items on future iterations of the VAC National Survey, and inform future research to support the development, management and improvement of programs and services provided to Veterans and their families.

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](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.

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

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

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

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

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

2.1.1 SACC Manual Clauses

SACC Manual Clause [A3050T](#) (2014-11-27) - Canadian Content Definition
SACC Manual Clause [A3015T](#) (2014-06-26) - Certification - Bid

2.2 Submission of Bids

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

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

2.3 Former Public Servant

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

Definitions

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

- a. an individual;

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;

- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 7 (seven) 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

Veteran Affairs 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: the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

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

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

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

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

Section I: Technical Bid four (4) hard copies and one (1) soft copy on a USB key

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

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

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

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

- If the Bidder is simultaneously providing copies of its bid using multiple acceptable delivery methods, and if there is a discrepancy between the wording of any of these copies and the electronic copy provided through epost Connect service, the wording of the electronic copy provided through epost Connect service will have priority over the wording of the other copies.

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

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573) (<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573>). To assist Canada in reaching its objectives, bidders should:

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

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

Section I: Technical Bid

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

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

Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Basis of payment in Annex "B". The total amount of Applicable Taxes must be shown separately.

3.1.2 Electronic Payment of Invoices – Bid

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

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

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

Section III: Certifications

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

Section IV: Additional Information

3.1.3 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures

3.1.3.1 As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

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

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

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

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

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

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

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

(SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

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

4.1.1.2 Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services Canada.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I, will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.
- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.

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- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, **only** that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.

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- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

- (a) In Phase III, Canada will complete the evaluation of all Bids found responsive to the requirements reviewed at Phase II. Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) A Bid is non-responsive and will receive no further consideration if it does not meet all mandatory evaluation criteria of the solicitation.

4.1.2 Technical Evaluation

4.1.2.1 Mandatory Technical Criteria

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

4.1.2.2 Point Rated Technical Criteria

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

4.1.3 Financial Evaluation

Financial evaluation is fully described in Annex "B3".

4.2 Basis of Selection

4.2.1 Basis of Selection – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum points specified for each criterion for the technical evaluation, and
 - d. obtain the required minimum of **1030** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **1600** points.
1. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
2. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **60%** for the technical merit and **40%** for the price.
3. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **60%**.
4. To establish the pricing score, each firm price or rate will be prorated against the lowest firm price or rate for each individual category of service. The ratio of **40%** will be calculated as follows: Lowest Average Firm Contract Price *multiplied by* 40 points *divided by* Bidder's Average Firm Contract Price = Weighted Financial Score for Firm Contract Price for Initial and Optional Contract Periods.
5. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
6. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

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

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 cy021
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Basis of Selection – Highest Combined Rating Technical Merit (60%) and Price (40%)

		Bidder A	Bidder B	Bidder C	Bidder D
Overall Technical Score		115/135	89/135	107/135	92/135
Average Bid Evaluation Price		\$55,000.00	\$64,298.00	\$69,996.87	\$71,409.33
Calculations	Technical Merit Score	115/135 x 60 = 51.111	89/135 x 60 = 39.556	107/135 x 60 = 47.556	92/135 x 60 = 40.889
	Total Weighted Financial Score	40.000	34.216	31.430	30.808
Combined Rating		91.111	73.772	78.986	71.697
Overall Rating		1 st	3 rd	2 nd	4 th

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](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.

5.2.3 Additional Certifications Precedent to Contract Award

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5.2.3.1 Canadian Content Certification

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

This procurement is limited to Canadian goods.

The Bidder certifies that:

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

Signature

Date

5.2.3.2 Status and Availability of Resources

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

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

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

Signature

Date

5.2.3.3 Education and Experience

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

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

Signature

Date

5.2.3.4 Bilingual Capabilities

The bidder must certify that the proposed project team will have the ability to conduct research in both official languages.

Signature

Date

5.2.3.5 Market Research Standards

The Bidder must agree in writing to conform to all the applicable quantitative and qualitative research standards of the Government of Canada (<http://publiservice.tpsgc-pwgsc.gc.ca/rop-por/recherche-research-eng.html#a1>);

Signature

Date

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:
 - a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - d) the Bidder's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - e) the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program](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.

PART 7 - RESULTING CONTRACT CLAUSES

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

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

CLIENT EXPERIENCES WITH VETERANS AFFAIRS CANADA REHABILITATION PROGRAM AND CASE MANAGEMENT SERVICES

POR # 063-18

7.1 Statement of Work

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

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

SACC Manual Clause [4007](#) (2010-08-16) – Canada to Own Intellectual Property Rights in Foreground Information

SACC Manual Clause [4008](#) (2008-12-12) – Personal Information, apply to and form part of the Contract

SACC Manual Clause [A9122C](#) (2008-05-12) – Protection and Security of Data Stored in Databases

7.3 Security Requirements

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

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

7.3.1.2. The Contractor personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the CISD/PWGSC.

7.3.1.3. The Contractor MUST NOT utilize its Information Technology systems to electronically process, produce or store PROTECTED information until the CISD/PWGSC has issued written approval. After approval has been granted or approved, these tasks may be performed at the level of **PROTECTED B**.

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

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

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

7.3.2 Contractor's Sites or Premises Requiring Safeguarding Measures

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

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

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

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of contract award to **September 30th, 2019**, inclusive.

7.4.2 Option to Extend the Contract

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

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

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Paola Amaral
Supply Specialist

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Buyer ID - Id de l'acheteur
cy021
CCC No./N° CCC - FMS No./N° VME

Public Works and Government Services Canada
Acquisitions Branch
Communication Procurement Directorate
Constitution Square
360 Albert Street, 12th Floor
Ottawa, Ontario K1A 0S5

Tel.: 613-998-8588
E-Mail: paola.amaral@pwgsc-tpsgc.gc.ca

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

7.5.2 Project Authority

The Project Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

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

7.5.3 Contractor's Representative

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

7.6 Proactive Disclosure of Contracts with Former Public Servants

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

7.7 Payment

7.7.1 Basis of Payment

7.7.1.1 Professional Fees

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price as specified in Annex "B", for a total cost of \$ _____. Customs duties are included and Applicable Taxes are extra.

7.7.1.2 Other Direct Expenses

The Contractor will be reimbursed for the direct expenses reasonably and properly incurred in the performance of the Work. These expenses will be paid at actual cost without mark-up, upon submission of an itemized statement supported by receipt vouchers.

Estimated Cost: \$ _____

7.7.1.3 Total Estimated Contract Price: _____. Applicable Taxes extra.

7.7.2 Limitation of Price

SACC Manual clause [C6000C](#) (2017-08-17) Limitation of Price

7.7.3 Monthly Payments

SACC Manual clause [H1008C](#) (2008-05-12) Monthly Payment

7.7.4 Electronic Payment of Invoices – Contract

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

- a. *Direct Deposit (Domestic and International)*

7.7.5 Discretionary Audit

SACC Manual clause [C0705C](#) (2010-01-11) Discretionary Audit

7.8 Invoicing Instructions

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

7.9 Certifications and Additional Information

7.9.1 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.

7.9.2 SACC Manual Clauses

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

7.10 Applicable Laws

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

7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4008](#) (2008-12-12) – Personal Information;
- (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" Evaluation Criteria;
- (g) Annex "D", Security Requirements Check List and IT Security Guide;
- (h) Annex "E", Electronic Payment Instruments
- (i) Annex "F", Political Neutrality Certification
- (j) Annex "G", Public Opinion Research Final Report Checklist
- (k) the Contractor's bid dated _____.

7.12 Political Neutrality Certification

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

7.13 Protection and Security of Data Stored in Databases

1. The Contractor must ensure that all the databases containing any information related to the Work are located in Canada or, if the Contracting Authority has first consented in writing, in another country where:
 - a. equivalent protections are given to personal information as in Canada under legislation such as the Privacy Act, R.S. 1985, c.P-21, and the Personal Information Protection and Electronic Documents Act, S.C. 2000, c.5, and under any applicable policies of the Government of Canada; and
 - b. The laws do not allow the government of that country or any other entity or person to seek or obtain the right to view or copy any information relating to the Contract without first obtaining the Contracting Authority's written consent.

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

2. The Contractor must control access to all databases on which any data relating to the Contract is stored so that only individuals with the appropriate security clearance are able to access the database, either by using a password or other form of access control (such as biometric controls).
3. The Contractor must ensure that all databases on which any data relating to the Contract is stored are physically and logically independent (meaning there is no direct or indirect connection of any kind) from all other databases, unless those databases are located in Canada (or in an another country approved by the Contracting authority under subsection 1) and otherwise meet the requirements of this article.
4. The Contractor must ensure that all data relating to the Contract is processed only in Canada or in another country approved by the Contracting Authority under subsection 1.
5. The Contractor must ensure that all domestic network traffic (meaning traffic or transmissions initiated in one part of Canada to a destination or individual located in another part of Canada) is routed exclusively through Canada, unless the Contracting Authority has first consented in writing to an alternate route. The Contracting Authority will only consider requests to route domestic traffic through another country that meets the requirements of subsection 1.
6. Despite any section of the General Conditions relating to subcontracting, the Contractor must not subcontract (including to an affiliate) any function that involves providing a subcontractor with access to any data relating to the Contract unless the Contracting Authority first consents in writing.

ANNEX "A"
STATEMENT OF WORK

DEPARTMENT:

Veterans Affairs Canada (VAC)

PROJECT TITLE:

Client Experiences with Veterans Affairs Canada Rehabilitation Program and Case Management Services

PROJECT OVERVIEW

The supplier will conduct a qualitative study to explore the VAC National Survey 2017 findings for the Rehabilitation Services and Vocational Assistance Program (hereinafter referred to as the "Rehabilitation Program") and Case Management Services. The findings of this study will be used to increase VAC's understanding of clients' experiences with these programs/services, inform the development of survey items on future iterations of the VAC National Survey, and inform future research to support the development, management and improvement of programs and services provided to Veterans and their families.

The sample will include clients who participated in the VAC National Survey 2017 who consented to participate in future research studies. These clients must be currently participating or have in the past participated in the Rehabilitation Program and/or Case Management services. Public opinion qualitative research methods will be used to guide the project design.

BACKGROUND

Between February 23 and March 27, 2017, VAC conducted the VAC National Survey 2017 through a telephone survey with 1,508 randomly selected participants. Sample participants included War Service Veterans, CAF Veterans and Members, RCMP Veterans and survivors who were either in receipt of benefits or who had applied for a benefit in the last 12 months.

The research objectives were:

1. To gather information on Veteran health and well-being and the extent to which programs are effective in meeting recipients' needs; and
2. To gather information that would support improvements to service delivery and policy development.

The findings from the VAC National Survey 2017 demonstrated overall satisfactory results. However, lower satisfaction rates with aspects of the Rehabilitation Program and Case Management services were also reported. The VAC National Survey 2017 was designed to provide high level information on degrees of satisfaction with VAC services and benefits. To gain a better understanding of why there are lower satisfaction rates with Rehabilitation Program and Case Management services, further exploration is needed.

In November 2017 VAC's Deputy Minister provided approval to conduct a qualitative research project to explore VAC clients' experiences with the Rehabilitation Program and Case Management services, including the facilitators and/or barriers clients experience while engaged in these programs/services. The study sample will be drawn from VAC National Survey 2017 participants who have participated in VAC's Case Management Services and/or the Rehabilitation Program, and who have consented to participate in future VAC research.

RATIONALE AND INTENDED USE

A core responsibility of Veterans Affairs Canada is to support the care and well-being of Veterans and their families through a range of benefits, services, research, partnerships and advocacy. Ensuring the Rehabilitation Program and Case Management Services are meeting the needs of our clients is critical for their health and well-being. Further, as well-being has been established as the ultimate desired outcome for Veterans and their families, this qualitative research will contribute to the ongoing and systematic assessment, monitoring and improvement of programs and services that impact Veteran well-being. Gender Based Analysis Plus (GBA+) considerations will also be included in the research design to ensure an intersectional approach.

This research supports both Government of Canada and Veterans Affairs Canada priorities through the:

- VAC Well-being Framework (2017)
- VAC Departmental Results Framework (2017)
- [Government of Canada Policy on Results](#) (2016)

This research project seeks to gain a deeper understanding of the 2017 VAC National Survey findings for the Rehabilitation Program and Case Management Services. Findings will be used to a) increase VAC's understanding of clients' experiences with these programs/services, b) inform the development of survey items for future VAC National Surveys, and c) inform future research to support the development, management and improvement of programs and services provided to Veterans and their families.

RESEARCH PURPOSE

The purpose of this research project is to explore VAC clients' experiences in the Rehabilitation Program and/or Case Management Services.

RESEARCH QUESTIONS

The research question is:

1. What are Veterans Affairs Canada clients' experiences of participating in the Rehabilitation Program and/or Case Management Services?

RESEARCH OBJECTIVES

The research objectives are:

1. Explore clients' perceived experiences with their engagement in the Rehabilitation Program and/or Case Management Services;
2. Identify the facilitators and barriers to clients' participation in the Rehabilitation Program and/or Case Management Services;

3. Identify the facilitators and barriers to clients' completion of the Rehabilitation Program and/or Case Management Services.
4. Make recommendations for survey items on future iterations of the VAC National Survey; and
5. Make recommendations for future research to support the development, management and improvement of programs and services for Veterans and their families.

METHOD

This qualitative research will be undertaken following the Standards for the Conduct of Government of Canada Public Opinion Research—Qualitative Research as set forth by Public Service and Procurement Canada (PSPC).

As per the Standards for the Conduct of Government of Canada Public Opinion Research: Qualitative Research, the supplier should recommend a research design that it believes is cost efficient, will produce quality results, and is appropriate to meet the research objectives. If the recommended design is the same as the Statement of Work, the research firm should state that they believe this design is cost efficient, will produce quality results and is appropriate to meet the objectives of the research.

SAMPLE

The sample will consist of VAC clients from various geographical locations across Canada, who:

- Participated in the 2017 VAC National Survey
- Consented to participate in future research
- Currently participating in the Rehabilitation Program or have participated in and completed the Rehabilitation Program; and/or
- Currently in receipt of Case Management Services or have previously received Case Management Services.

RECRUITMENT

VAC will provide the supplier with a list of 178 VAC clients who participated in the VAC National Survey 2017 and who have agreed to be contacted for similar research projects conducted by VAC. This client contact list will be provided as an Excel spreadsheet with the clients' telephone number and name. The list will contain only essential information required for recruitment purposes. Recruitment will occur by telephone.

Participants must meet all the requirements specified for the study. The supplier and the VAC project authority will jointly create a participant screener to confirm participants meet the sample inclusion criteria outlined above. The screener will be administered by the supplier and must meet the standards for telephone recruitment as outlined in Section 5.5 ("Recruitment Screener") of the Standards for the Conduct of Government of Canada Public Opinion Research: Qualitative Research. The information collected for the screener will be retained and returned to VAC upon completion of the project.

DATA COLLECTION

The qualitative data collection strategy will be telephone interviews.

Telephone Interviews: A minimum of twenty-five semi-structured telephone interviews will be conducted (20 in English and 5 in French).

Telephone interviews will be audio recorded and transcribed verbatim using electronic software. Any identifying information will be de-linked from clients to protect client anonymity as per Section 1.3.3 ("Protection of Anonymity") of the Standards for the Conduct of Government of Canada Public Opinion Research: Qualitative Research. Handling of data (e.g. storage, transportation, transmittal or destruction) will be done in accordance with VAC protocols which adhere to Government of Canada standards.

DATA ANALYSIS

Data analysis strategies that are reflective of the original research purpose, objectives and questions will be used. Criteria and processes will be developed in collaboration with the project authority and used to facilitate a consistent approach for data analysis.

ETHICAL CONSIDERATIONS

In conducting qualitative research, there may be risks associated with information gathering and dissemination:

- **Risk of perception around use of information:** Clients may be concerned that their participation in an interview may be considered in assessments or adjudication of benefits.
 - Mitigation: Disclaimers would be provided to reassure clients that the results of the interviews will be anonymous and the supplier will be undertaking the analysis of the results.
- **Risks to information and privacy:** Clients may feel their personal information, or security of their information, is at risk with participation in the interviews.
 - Mitigation: VAC Privacy and Information Management will be engaged to ensure proper steps are taken to mitigate any risks to information privacy and security associated with gathering the interview information.

SUPPLIER REQUIREMENTS

The supplier should become knowledgeable of VAC's Rehabilitation Program and Case Management services as well as the VAC National Survey 2017 survey questions and results of the findings. These are the key identified programs and services for exploration.

http://epe.lac-bac.gc.ca/100/201/301/weekly_acquisitions_list-ef/2017/17-46/publications.gc.ca/collections/collection_2017/acc-vac/V32-343-2017-eng.pdf

The supplier will be required to complete the following tasks, all subject to approval of the project authority:

Pre-fieldwork

- Meet with the project authority via teleconference call to discuss the research purpose and objectives, design issues, work plan and research project schedule (with dates and responsibilities for milestones), research methodology details and sampling strategy. This includes:
 - Data collection strategies that are reflective of the research objectives and questions;

- Data analysis strategies that are reflective of the research objectives and questions;
- Strategies and criteria used to ensure and facilitate a consistent approach to all data analysis; and
- Outline and format of final research report (hard copy and electronic formats).
- Provide the names, roles and security clearances of the team members involved in the research project;
- Become knowledgeable of the VAC National Survey 2017 survey questions and findings related to the Rehabilitation Program and Case Management service results;
- Become knowledgeable of the VAC Rehabilitation Program and Case Management services purpose, target population, eligibility guidelines, the number and types of clients accessing program/service, established service standards, evaluation of outcomes, as well as common and diverse characteristics of the Rehabilitation Program and Case Management services;
- Provide advice on sampling design, including aspects of the research methodology;
- Provide description of strategies to achieve qualitative research rigor and validity;
- Provide a detailed data analysis strategy;
- Provide advice on how to recruit participants for interviews;
- Design a recruitment screener in collaboration with the VAC project authority to assess that the participants meet the study inclusion criteria (as per "Sample" section above).
- Provide advice on the design, logistics and structure of interviews;
- Develop an interview guide to be used for interviews, translate; and submit final version to the project authority for approval; and
- Develop participant consent forms for interviews in collaboration with project authority and VAC Privacy, translate, and submit final version to the project authority for approval.

Fieldwork

- Recruit participants for the interviews in accordance with requirements provided by the project authority;
- Inform participants of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes:
 - informing participants of the purpose of the research;
 - identifying both the sponsoring department/agency and Government of Canada as a whole;
 - informing participants that their participation in the study is voluntary and the information provided will be administered according to the requirements of the *Privacy Act*;
 - informing how the rights of participants will be respected;
 - informing participants of audio-recording and intended use of recordings, or presence of observers (if applicable); and
 - Informing participants that the study will be made available to the public in 6 months after completion through Library and Archives Canada.
- Obtain participant consent for audio recording of telephone interviews.
- Interview a minimum of 25 participants by telephone in the language of the participant's choice, (i.e., 20 in English and five in French). Interviews are to be conducted by seasoned/experienced interviewers only.
- Ensure effective quality control measures;
- Provide verbal debriefing(s) to project authority; and
- Create an electronic database file, enter and analyze interview transcripts of audio recordings (coding procedures and analysis to be defined in consultation with the project authority). Original audio-recordings must be stored securely with the supplier until such time as all personal information, electronic or physical, is transferred back to VAC project authority and destroyed by the supplier.

Post-fieldwork

- Submit a report outline to the project authority for approval;
- Submit draft report in English and French containing an executive summary, table of contents, an analysis of the data to project authority for comments;
- Submit final report and executive summary in English and French to project authority for approval;
- Two printed copies in English and French of the final report and a separate electronic copy of the English and French executive summaries in web-accessible HTML5, and PDF formats.
 - Ensuring the executive summaries outline how the results were used if possible, and if not, how the information is expected to be used;
 - The total contract value of the POR project; and
 - An outline of results, including analysis, conclusions and opportunities for service improvement.
- Submit the required electronic and printed version of the report as outlined below, with appropriate appendices;
- Make an oral presentation via teleconference/WebEx of the final results to project authority; and
- Submit the electronic database file to the project authority, all other hardcopy files and any further information gathered related to the project.

Other Requirements

- Perform other functions essential to the administration of the research;
- Provide regular progress reports, including attending meetings either in-person or via teleconference;
- Demonstrate that all steps of the research project shall comply with market research industry standards, including the GoC standards for conducting POR;
- The Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research must be respected and applied in whole to all aspects of the conduct of the research. The project authority must be informed should the firm determine that certain elements of the standards cannot be accommodated in the course of the contract. Justification must be provided and written permission received from the project authority in these instances;
- The selected researcher must indicate that a signed statement of political neutrality will be submitted as part of the final research report, as per the Directive on the Management of Communications;
- Consider implications of the research findings and recommendations for the Government of Canada;
- Provide written consent allowing Library and Archives Canada to post the report in both official languages;

INFORMATION MANAGEMENT AND SECURITY REQUIREMENTS

Records Management

The supplier must ensure that any and all records created in any form as the result of the Contract, regardless of the medium and the physical characteristics, remain the property of the Government of Canada under the governance of VAC and that the records are not used, disclosed or disposed of without prior written authorization from the VAC project authority. The supplier must further ensure it will only collect the information that is directly required for the purpose of the Contract and that this information will not be used for any other purpose than to perform the work.

The supplier must maintain a records storage space and medium approved by the VAC project authority and Public Services and Procurement Canada (PSPC). The supplier must store all records in a manner

consistent with the [Government Information Management and Disposition](#) standards as established by Library and Archives Canada.

The supplier acknowledges that the Government of Canada under the governance of VAC maintains ownership and control over all personal information and any other information that is collected, created, captured, received, used, processed, handled, stored, and recorded by the supplier when fulfilling the requirements outlined in the contract. All personal information will be returned to the project authority in full within 30 days of the completion of the contract and will be destroyed by the supplier upon completion of contract (see "Use of Personal Information").

A copy of the technical data (e.g. study design, recruiting materials, interview guides) will be maintained with the supplier for a period of three years. After three years, all technical data, electronic or otherwise, must be deleted from the supplier's databases or otherwise destroyed. As per section 8 of the Standards for the Conduct of Government of Canada Public Opinion Research—Qualitative Research, it is the supplier's responsibility to destroy all technical data associated with the project after the three year retention period has elapsed.

The supplier must retain all electronic and non-electronic information, unless otherwise specified by the VAC project authority at the supplier's expense and in a format acceptable to the VAC project authority. VAC has the right to access all relevant records relative to its clients provided by the supplier. No records shall be destroyed until permission is received from VAC during the period of the contract. The supplier will destroy all technical data after the three year retention period has lapsed.

Documents and records must be labelled, filed, and stored in a logical and organized manner, using the client identification number, which will enable proper disposition or an effective and efficient transfer of documents back to VAC, upon completion of the contract. All hard copy material must be filed in boxes, inventoried, and clearly labelled to facilitate transfer and integration back to the Department's holdings. When the contract is complete, all personal records must be transferred in a secured manner in accordance with Government of Canada standards concerning the maintenance of handling of Protected B information and the supplier must not retain any copies of the personal records. Information, documentation, and records must not be sold, donated, auctioned, or discarded.

All work under this contract, including any electronic data back up and storage, must be performed in Canada.

Ownership and Control

All information (personal, technical or otherwise) which is used, processed, handled, stored, and recorded by the supplier for the purposes of fulfilling the requirements of the contract, regardless of the format, medium, and physical characteristics, remains under the ownership and control of the Government of Canada under the governance of VAC. All applicable Federal legislations apply under all circumstances, even when such information is in the sole custody of the supplier.

The supplier acknowledges that the Government of Canada under the governance of VAC maintains ownership and control over all personal information and any other information that is collected, created, captured, received, used, processed, handled, stored, and recorded by the supplier when fulfilling the requirements outlined in the contract.

Upon delivery of the final requirements of the contract, the supplier will ensure that all information referenced above is returned to the project authority.

Trans Border Data Flows and Storage of Information

As the supplier is responsible for the collection of sensitive personal information of clients, the supplier must take all steps to ensure that the client's privacy is protected against any possible risks related to the

issue of trans-border flow of information in accordance with the laws of Canada. Such protection can only be satisfactorily achieved if all databases are located in Canada where compliance with Canadian privacy laws can be assured. The supplier must not engage in any such activities where personal information of VAC clients may be compromised by foreign laws.

The supplier must manage information and electronic data to meet Canada's operational requirements and must ensure that:

- Database(s) is located and only accessible in Canada;
- Database(s) is physically independent from all other databases, directly or indirectly, which are located outside of Canada;
- All records and information storage (electronic and hard copy data and information) as well as any backup locations are located in Canada and a backup plan is in place;
- The remote access to data and data systems be restricted to individuals or entities who have obtained prior approval in writing by VAC to do so;
- Data in transit is appropriately encrypted in accordance with the requirements outlined in the TBS Management of Information Technology Security Standard <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12328§ion=text>; and
- Certification for Protection of Personal Information is provided.

Management of Electronic Records

The supplier must use a security cleared electronic records database that can be used for records received, created, used or held by the supplier to manage their information. The supplier must use a certified electronic document/records management system which will protect essential records and preserve information (as outlined in section 7.3 "Security Requirements").

The supplier must have the capacity to convert all paper copy records to electronic records in accordance with the technical specifications for imaging. Paper copy records that have been converted to electronic records cannot be destroyed until such time as a digitization standard has been put in place by VAC and written permission from the VAC project authority to destroy paper copy records has been granted.

Metadata

The supplier must include records management metadata about each electronic record it collects, creates or holds during the performance of the Work, regardless of format, in accordance with the TBS Standard on Metadata that can be found at: <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=18909§ion=text> (as outlined in section 7.3 "Security Requirements").

Security

All research material will be stored in a secure office facility. All personal data (audio recordings and transcripts) will be secured on a password protected removable device that will be stored in a locked drawer in the interviewer's office. Interview transcripts will then be anonymized for storage. Participants will never be referred to by name. In the case where a participant's particular experience is referred to, a pseudonym will be used to protect their anonymity. Personal data will be anonymized and destroyed in accordance with government security policy following completion of the Report with VAC guidance and approval.

The supplier acknowledges that Veterans Affairs Canada is bound by the *Privacy Act* with respect to the protection of personal information as defined in the *Act*. The supplier must keep private and confidential any such personal information collected, created or handled by the supplier under the contract, and must not collect, use, copy, disclose, dispose of or destroy such personal information except in accordance

with the *Privacy Act* and *Library and Archives Act* and the delivery provisions of the contract (as outlined in section 7.3 "Security Requirements").

PRIVACY REQUIREMENTS

Collection of Personal Information

Personal information collected about clients by the supplier for the provision of services covered by the contract shall be collected in accordance with the following requirements.

1. Authorized in legislation and confirmed that it has been so authorized by the project authority.
2. The supplier shall notify individuals from whom it collects personal information of:
 - (a) purpose for collecting it
 - (b) statutory authority(ies) for the collection
 - (c) whether the response is voluntary or required by law;
 - (d) possible consequences of refusing to respond;
 - (e) individual's right of access to and correction of the information; and
 - (f) number of personal information banks in which the personal information will be retained.
3. Limited to that which is required for the administration of services and benefits necessary for the supplier to comply with the contract (there shall be a demonstrable need for each piece of personal information collected:
4. Unless otherwise directed in writing, information is to be collected directly from the individual to whom the information relates; and
5. If information is collected from a third party, it is to be collected with the clients consent or with an appropriate legislative authority authorizing collection.

The supplier shall agree to work with the project authority to determine the personal information elements that will be collected to fulfill the requirements of the contract, and to develop the notification statement that will be used when collecting personal information from clients.

Note: The project authority will review and approve all forms that the supplier proposes to use in support of the collection of information. After initial approval, if changes or amendments are made by the supplier, during the life of the contract, the forms shall be re-approved by the project authority. The supplier's employees shall effectively identify themselves to the individuals from whom they are collecting personal information and provide individuals with a means to verify that they are actually working on behalf of the project authority and authorized to collect the information.

Use of Personal Information

Unless otherwise directed in writing, the supplier shall use all personal information solely for the purpose(s) for which it was provided, as determined by the Department to which the information belongs and in accordance with the requirements of the contract.

All personal information is under the control of Veterans Affairs Canada, and the supplier has no right in or to that information. The supplier must deliver to the project authority all such personal information in whatever form, including all working papers, notes, memoranda, reports, data in machine-readable format or otherwise, and documentation which have been made or obtained in relation to the contract, with 30 days of the completion or termination of the contract or at such earlier time as the project authority may request. Upon delivery of the personal information to the project authority, the supplier will have no right to retain that information in any form and must ensure that no record of the personal information remains in the supplier's possession.

Disclosure of Personal Information

Information in the custody of the supplier shall not be disclosed or transferred to a third party, except in accordance with specifics of the contract, without the written permission of the Department to which the information belongs.

If the supplier receives any request for disclosure of personal information for a purpose not authorized under the contract, or if it becomes aware that disclosure may be required by law, the supplier shall immediately notify the project authority about the request or demand for disclosure and shall not disclose the information without the written permission of the Department to which the information belongs. Information from any one (1) specific Department shall not be shared with any of the other Departments unless authorized by the specific Department to which the information belongs.

Requests for Information

Should the supplier receive a request for information from a third party the supplier will advise the project authority. Following consultation with the VAC Access to Information and Privacy Coordinator, the project authority will provide the supplier with guidance and direction on handling the request.

Notification of Non-Compliance or Breach of Privacy and Security

The supplier shall notify, in writing, the VAC project authority and PSPC immediately of any reason it does not comply with the Privacy and Security provisions of the Contract in any respect. The supplier shall promptly notify the project authority of the particulars of the non-compliance and what steps it proposes to take to address, or prevent recurrence of the non-compliance.

The supplier shall notify the project authority immediately when it becomes aware of an occurrence of breach of privacy or of the security requirements of the contract. This includes but is not limited to:

- a) unauthorized access to or modification of the personal information in its custody
- b) unauthorized use of the personal information in its custody
- c) unauthorized disclosure of the personal information in its custody
- d) a breach of privacy or security with respect to personal information in its custody or with respect to any computer system in its custody and that may be used to access personal information.

The supplier shall work with VAC to achieve resolution and compliance with Government of Canada privacy and security requirements.

DELIVERABLES

The supplier will ensure the deliverables will meet the reporting requirements identified within the Standards for the Conduct of Government of Canada Public Opinion Research—Qualitative Research:

- A final recruiting screener document in English and French (a draft will be provided by the project authority for consultation purposes);
- An interview guide in English and French for interviews (a draft will be provided by the project authority for consultation purposes);
- A verbal debrief to the project authority on recruitment updates;
- A verbal debrief to the project authority within 48 hours of completion of the field work;
- A draft report which will be subject to the approval of the project authority;
- The narrative executive summary in English in Word, PDF and HTML5 formats;
- The narrative executive summary in French in Word, PDF and HTML5 formats;
- The final report(s) in both English and French in Word, PDF and HTML5 formats;
- Five hard copies of the final report(s) in both English and French, which must include the full research findings and appendices (10 in total);
- All gathered research data including original electronic transcripts and audio recordings interviews;

- Final reports must comply with the following:
 - Financial Administration Act;
 - Library and Archives of Canada Act;
 - Public Opinion Research Contract Regulations;
 - Policy on Communications and Federal Identity; and
 - Directive of the Management of Communications.

REPORTING

The supplier must ensure that all final report submissions must be in an electronic format and meet the requirements of the *Standard of Web Accessibility* and ready for submission to the Library and Archives Canada (including the Government of Canada catalogue number and ISBN). Please refer to the Public Opinion Research Final Report Checklist <https://www.tpsgc-pwgsc.gc.ca/rop-por/lvpor-porfrc-eng.html#c> that summarizes the legislative, regulatory and policy reporting requirements as well as industry and Government of Canada Standards.

These separate documents must be submitted to the project authority:

- An electronic copy of the executive summary in English and French in web-accessible HTML5, and PDF formats.
- An electronic copy of the final aggregate report in English AND French in web-accessible HTML 5, and PDF formats.
- Executive Summaries and Final Reports must also be submitted in PDF/Archivable (PDF/A) format.

The English and French narrative executive summaries should include the following information on the **cover page**:

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

Information that should be included in the **narrative executive summaries**:

- a statement of the research **purpose** and **objectives**;
- a summary of **key findings**;
- an **outline of how the results were used**, if possible, and if not, **how the information is expected to be used**;
- a brief description of the **methodology** used;
- a statement as to the extent to which the **findings can be extrapolated** to a broader audience; and

- the **contract value** of the POR project

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

Information that should be included in the **final reports**:

- the **narrative executive summary**;
- the full **results findings** (including introduction and methodology, analysis, approach and research considerations including mention of the non-generalizability of qualitative research, participant profile, findings and conclusion); and
- the **appendices**, including but not limited to:
 - screening questionnaire;
 - research instruments and the materials tested;
 - description of the methods, the sampling source and sampling method (including the procedures for selecting participants, and dates of research fieldwork);
 - interview guide, coded interview data, analysis matrix, and detailed analysis and findings for each question;
 - discussion/interview materials;
 - a signed statement of political neutrality;
 - the nature, location, approximate length and number of any presentations; and
 - any other deliverables required in the Statement of Work.

The copyright section to be provided by VAC must include the report's corresponding:

- Government of Canada catalogue number
- International Standard Book Number (ISBN)
- copyright notice with the year of publication
- departmental notice on the rights to reproduce the report

PROJECT SCHEDULE

- Contract awarded, TBD
- Initial client-supplier meeting/teleconference (week 1)
- Draft screener guide for interviews (week 1-2)
- Draft interview guide (week 2-3)
- Recruitment of interview participants (week 4-5)
- Conduct interviews (week 6-8; * all data collection must be completed before March 31st, 2019)
- Verbal debrief of interviews (2 business days following the end of the field work) (week 8)
- Data Analysis (week 6-10)
- Draft report (English only) (week 11)
- Final report (English and French) (week 12)

Please note: This schedule is tentative and is subject to change upon mutual consent of the project authority and the supplier.

LANGUAGE REQUIREMENTS

Interviews will be conducted in either English or French. All final deliverables will be provided in English and French.

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

Annex "B1" – Basis of Payment
Annex "B2" – Pricing – Qualitative Research
Annex "B3" – Financial Evaluation

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ANNEX "B1"
BASIS OF PAYMENT

B1.1 NOTE TO BIDDERS

Bidders are requested to submit rates and fees, specified below, for all the periods.

- Firm, all inclusive, hourly rates for Client Liaison;
- Firm, all inclusive, hourly rates for Senior Researcher;
- Firm, all inclusive, hourly rates for Recruitment and Participant Confirmation, and Translator;
- Firm, all inclusive, hourly rates for Other Professional Rates.

The rates and level of effort submitted under "B2" – Pricing" will be used to calculate the Firm price of each period.

All provided rates and fees under "B2" – Pricing" will be evaluated under "B3" – Financial Evaluation".

The Contractor will be paid in accordance with the following Basis of Payment for work performed pursuant to the resulting Contract.

The names of resources which will be identified in the resulting contract must meet the minimum requirements for the category of service for which they are being proposed, as described in Annex "C" - Technical Evaluation Criteria.

If pricing is not provided for a component, a price of zero will be assigned for the component and the Bidder will be provided an opportunity to agree with the zero amount.

If the Bidder agrees then the Basis of Payment will be considered compliant. However, if the Bidder disagrees, then the proposal will be found non-compliant and no further evaluation will be done.

Canada will not accept any travel and living expenses incurred by any contractor as a consequence of any relocation required to satisfy the terms of any resulting contract.

The rates are in Canadian currency, Customs and duties are included, and Applicable Taxes are extra, if applicable.

All deliverables are F.O.B. Destination, and Canadian Customs Duty included, where applicable.

All prices and amounts of money in the Contract are exclusive of Applicable Taxes unless otherwise indicated. The Applicable Taxes, whichever is applicable, is extra to the price herein and will be paid by Canada. Applicable Taxes, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated,

Solicitation No. - N° de l'invitation
51019-181009/A
Client Ref. No. - N° de réf. du client
51019-18-1009

Amd. No. - N° de la modif.
File No. - N° du dossier
cy021.51019-181009

Buyer ID - Id de l'acheteur
cy021
CCC No./N° CCC - FMS No./N° VME

exempt or to which the Applicable Taxes does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to Canada Customs and Revenue Agency any amounts of Applicable Taxes paid or due.

B1.2 DIRECT EXPENSES – EXTERNAL AND INTERNAL

In certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses and outside of the rates of the basis of payment are required to complete the Work, such expenses may be allowable as direct expenses given the service(s) is/are documented in the approved Contract. All such direct expenses must have prior authorization of the Project Authority and will be invoiced at cost with no allowance for overhead or profit, and must not exceed the ceiling price provided.

B1.3 PRICE SUPPORT

The Bidder may be required to provide documents in support of the quoted rates such as a copy of the applicable current published price list; or a copy of a paid invoice for like items or services and percentage discount for the Government of Canada.

B1.4 CONTRACTUAL JOINT VENTURE (if applicable)

The Bidder is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition, it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.

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**ANNEX "B2"
 PRICING – QUALITATIVE RESEARCH**

The Bidder must provide all-inclusive **firm rates**, in Canadian currency, taxes extra, and level of effort, in number of hours, for the initial period of the Contract and for each of the option periods thereafter.

The firm all-inclusive price for the contract period plus options will be calculated under B2.2.

B2.1 FIRM RATES – QUALITATIVE RESEARCH

B.2.1.1 CLIENT LIAISON

(Insert the name of the proposed individual(s), their hourly rate(s) and their level of effort)

Client Liaison	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
<i>(Add lines if required)</i>						
B2.1.1 TOTAL	\$ _____		\$ _____		\$ _____	

B2.1.2 SENIOR RESEARCHER: PROJECT MANAGEMNET, DESIGN, MODERATING, INTERVIEWING, ANALYSIS, REPORTING

(Insert the name of the proposed individual(s), their hourly rate(s) and their level of effort)

Senior Researcher	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
<i>(Add lines if required)</i>						
B2.1.2 TOTAL	\$ _____		\$ _____		\$ _____	

B2.1.3 RECRUITMENT AND PARTICIPANT CONFIRMATION, AND TRANSLATOR

The bidder must provide firm hourly rates and level of effort for the following categories of Personnel typically involved in the qualitative fieldwork.

Category of Personnel (individual names not required)	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
Field Supervisor						
Field Manager						

Solicitation No. - N° de l'invitation
 51019-181009/A
 Client Ref. No. - N° de réf. du client
 51019-18-1009

Amd. No. - N° de la modif.
 File No. - N° du dossier
 cy021.51019-181009

Buyer ID - Id de l'acheteur
 cy021
 CCC No./N° CCC - FMS No./N° VME

Interviewer / Recruiter				
Translator				
B2.1.3 TOTAL	\$ _____	\$ _____	\$ _____	

B2.1.4 OTHER PROFESSIONAL RATES

This section must be completed by the Bidder who would like to identify other categories of personnel to be used during the initial contract period and the option periods. If, for example, the Bidder intends to use the services of a Junior Researcher, it **must** indicate this category in the table below.

The use of the individual(s) is subject to acceptance by the Project Authority. If applicable, the Bidder **must** provide firm hourly rates for categories of personnel involved in research projects.

Category of Personnel (Identify)	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
<i>(Add lines if required)</i>						
B2.1.4 TOTAL	\$ _____		\$ _____		\$ _____	

B2.1.5 DIRECT EXPENSES

The Bidder must provide a total estimated ceiling price, excluding GST/HST, for direct expenses for each contract period. As per B1.2 these costs are to be billed at cost, with no allowance for overhead or profit, and must not exceed the ceiling price provided.

Direct Expenses Breakdown	Initial Contract Period	First Option Year	Second Option Year
<i>(Add lines if required)</i>			
TOTAL	\$ _____	\$ _____	\$ _____

B2.2 FIRM ALL INCLUSIVE PRICE – FOR EVALUATION PURPOSES ONLY

The following table is the firm all-inclusive price submitted by the Bidder for the initial contract period and for each additional option years.

Please complete the table using the totals from tables B2.1.1, B2.1.2, B2.1.3, B2.1.4, and B2.1.5.

	INITIAL CONTRACT PERIOD	1 st OPTION PERIOD	2 nd OPTION PERIOD
B2.1.1 Total	\$ _____	\$ _____	\$ _____
B2.1.2 Total	\$ _____	\$ _____	\$ _____
B2.1.3 Total	\$ _____	\$ _____	\$ _____
B2.1.4 Total	\$ _____	\$ _____	\$ _____
B2.1.5 Total	\$ _____	\$ _____	\$ _____
FIRM ALL INCLUSIVE PRICE (GST/HST EXTRA)	\$ _____	\$ _____	\$ _____

=====

**ANNEX "B3"
 FINANCIAL EVALUATION**

The following steps will be followed for the Financial Evaluation using the rates or fees provided in the Annex "B2" of the Basis of Payment:

- **B2.2 Firm All Inclusive Price – For Evaluation Purposes Only**

The entire Financial Evaluation is worth 40% of the total proposal final score. The allotment per step above will be as follows:

POINTS ALLOTTED TABLE:

Steps of Financial Evaluation	Weighting	Points Allotted (for calculation purposes)
B2.2 Firm All Inclusive Price – For Evaluation Purposes Only	100%	40
TOTAL	100%	40

B.3.1 FIRM ALL INCLUSIVE PRICE AND BID EVALUATION VALUE

Step 1: An average firm contract price will be calculated using the rates submitted for each years of the contract (initial 1-year period, first option and second option) in B2.2.

Example of Step 1:

Bidder	Firm Price for Initial Contract Period	Firm Price for First Option Period	Firm Price for Second Option Period	Average Firm Contract Price

Solicitation No. - N° de l'invitation
 51019-181009/A
 Client Ref. No. - N° de réf. du client
 51019-18-1009

Amd. No. - N° de la modif.
 File No. - N° du dossier
 cy021.51019-181009

Buyer ID - Id de l'acheteur
 cy021
 CCC No./N° CCC - FMS No./N° VME

Bidder A	\$50,000.00	\$55,000.00	\$60,000.00	\$55,000.00
Bidder B	\$60,000.00	\$64,200.00	\$68,694.00	\$64,298.00
Bidder C	\$65,000.00	\$69,875.00	\$75,115.62	\$69,996.87
Bidder D	\$70,000.00	\$71,400.00	\$72,828.00	\$71,409.33

Step 2:

The weighted Financial Score will be determined for each Bidder.

The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** above.

Example of Step 2:

Lowest Average Firm Contract Price X 40 *divided by* Bidder's Average Contract Price = Weighted Financial Score for Firm Contract Price for Initial and Contract Periods

Bidder	Average Firm Contract Price	Total Weighted Financial Score
Bidder A	\$55,000.00	40.000
Bidder B	\$64,298.00	34.216
Bidder C	\$69,996.87	31.430
Bidder D	\$71,409.33	30.808

ANNEX "C"
EVALUTION CRITERIA

EVALUATION SUMMARY	
1. MANDATORY TECHNICAL EVALUATION CRITERIA	
<ul style="list-style-type: none"> • M.1 – Client Liaison • M.2 – Senior Researcher • M.3 – Sample Projects – Senior Researcher • M.4 – Financial Proposal / Basis of Payment • M.5 – Security Requirements 	
2. POINT RATED TECHNICAL EVALUATION CRITERIA	Minimum / Maximum Points Required
R.1 – Understanding the Requirement	70 / 100
R.2 – Methodology and Research Procedures Section I: Methodology Section II: Recruitment Procedures Section III: Data Collection Capability and Quality Control Section IV: Analysis Section V: Addressing Issues and Challenges	630 / 900 140 / 200 140 / 200 105 / 150 140 / 200 105 / 150
R.3 – Senior Researcher a) Academic Qualifications b) Work Experience	105 / 150 35 / 50 70 / 100
R.4 – Sample Projects – Senior Researcher	225 / 450
OVERALL TOTAL	1030 / 1600

1. MANDATORY TECHNICAL EVALUATION CRITERIA

The proposal must meet **ALL** of the Mandatory Evaluation Criteria. If the proposal fails to meet any of the Mandatory Evaluation Criteria the proposal will not be evaluated any further.

	MANDATORY CRITERIA	REFERENCED SECTION IN BIDDER'S PROPOSAL
M.1	<p>CLIENT LIAISON</p> <p>The proposal must identify one (1) individual who they propose to act as a client liaison in English and one (1) individual to act as a client liaison in French. The proposal must submit the language profile for each proposed individual. The individual identified for each language can be the same person. The Client Liaison does not need to be a senior researcher, but must have knowledge of POR.</p>	
M.2	<p>SENIOR RESEARCHER</p> <p>The proposal must identify a minimum of one (1) senior researcher, with a minimum of five (5) years' experience, who they propose to design research, conduct fieldwork, analyze results, and write reports in English and a minimum of one (1) senior researcher, with a minimum of five (5) years' experience, who they propose to design research, conduct fieldwork, analyze results, and write reports in French. This individual identified for each language can be the same person. A Curriculum Vitae (CV) for each person identified must be submitted. The CV's will be evaluated in the rated requirements under R.3.</p>	
M.3	<p>SAMPLE PROJECTS – SENIOR RESEARCHER</p> <p>To demonstrate the experience of the proposed Senior Researcher(s) the proposal must include two (2) qualitative POR projects (sample projects) for each official language for which the researcher is submitted. The same sample projects can be submitted for both the English and the French sample projects if the same proposed Senior Researcher conducted the fieldwork in both official languages.</p> <p>Each sample project submitted must meet the following criteria:</p> <ul style="list-style-type: none"> a) The Senior Researcher must have conducted at least 6 individual interviews, in the language for which they are proposed; b) The fieldwork projects must have been completed in the last three (3) years preceding the bid closing date. c) At least one of the sample projects must be national* in scope 	

	<p>*National is defined as a sample project where interviews were conducted in at least three (3) regions of Canada. The regions are:</p> <ul style="list-style-type: none"> • British Columbia; • Prairies (Alberta, Saskatchewan, Manitoba); • Ontario; • Quebec; • Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador); and • The Territories (Yukon, Northwest Territories, Nunavut). <p>Note: Samples submitted will be evaluated in the Point Rated Technical Evaluation <i>R4 – Sample Projects – Senior Researcher</i>. Please use the sample project format in R.4 to submit samples.</p>	
<p>M.4</p>	<p>FINANCIAL PROPOSAL / BASIS OF PAYMENT</p> <p>The proposal must include a firm, all-inclusive price, for the initial contract period and each of the option periods in accordance with Annex “B2” - Pricing – Qualitative Research.</p>	
<p>M.5</p>	<p>SECURITY REQUIREMENTS</p> <p>At the date of bid closing, the following conditions must be met:</p> <ol style="list-style-type: none"> a) The Bidder must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of PROTECTED B. Document Safeguarding is the authorization to store, handle and protect Protected or Classified information or assets at the supplier’s work site(s). b) The Bidder’s proposed personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS. <p>NOTE: 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.</p> <p>These clearances must be issued/granted by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).</p>	

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

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2. POINT RATED TECHNICAL EVALUATION CRITERIA

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

R.1 – UNDERSTANDING THE REQUIREMENT (Minimum 70, Maximum 100 points):

The proposal should include a narrative summary which reflects their understanding of the Statement of Work. Simply repeating the Statement of Work, in whole or in part, does not indicate an understanding of the sample project’s aims and objectives or the ability to carry it out.

Points	Rating Level
Not met (0 points)	Not provided. Does not demonstrate an understanding of the requirements of the Statement of Work.
Weak (50% of points)	Proposal demonstrates partial understanding of the Statement of Work. Elements are missing or unclear.
Meets minimum passing requirement (70% of points)	Proposal clearly demonstrates an understanding of the Statement of Work. The summary includes proposed approach, methodology, and discussion of challenges, and difficulties anticipated.
Exceeds passing requirement (100% of points)	Proposal provides a clear and detailed understanding of the Statement of Work. The summary includes proposed approach, methodology, and discussion of challenges and difficulties anticipated. In addition, the proposal includes a rationale for the proposed approach and methodology and includes possible solutions to each of the challenges and each of the difficulties anticipated.

R.2 – METHODOLOGY AND RESEARCH PROCEDURES (Minimum 630 points - Maximum 750 points)

The proposal should include a complete description of the methodology and research procedures, including a proposed approach that involves strategic choices in relation to the population that can be effectively covered, the type of techniques that are practical given the geographic location, the ease/difficulty of conducting research, and the suitability of the given techniques for the target population. Proposals should include a rationale for these choices as part of the proposal, as well as address the rationale for the approach, a description of the approach to analysis and potential challenges/problems that could arise and how each will be addressed.

The following rated criteria will be used for evaluation:

Section I: Methodology (Minimum 140 points – Maximum 200 points)

The degree to which the proposal describes a suitable methodology, including a proposed approach that involves strategic choices in relation to the population that can be effectively covered, the type of

techniques that are practical given the recruitment list, the ease/difficulty of conducting research, and the suitability of the given techniques for the target population.

Section II: Recruitment Procedures (Minimum 140 points - Maximum 200 points)

The degree to which the proposal describes and rationalizes the recruitment method(s) and mitigation of a small sample source(s). Describe and rationalize proposed techniques used to segment participants into specific demographic or attitudinal categories.

Section III: Data Collection Capability and Quality Control (Minimum 105 points - Maximum 150 points)

The degree to which the proposal describes and rationalizes the data collection capability and all quality control mechanisms that will be in place to ensure the reliability and validity of the results.

Section IV: Analysis (Minimum 140 points – Maximum 200 points)

The degree to which the proposal describes and rationalizes a rigorous approach to data analysis that is methodologically congruent with the research objectives.

Section V: Addressing Issues and Challenges (Minimum 105 points - Maximum 150 points)

The degree to which the proposal describes potential challenges/problems that could arise and how each will be addressed. For example:

- People with disabilities
- Sensitive populations
- Elderly populations
- Accessibility issues
- Recruiting issues

Points	Rating Level for Sections I, II, III, IV, V
Not met (0 points)	Not provided. Does not demonstrate that they meet the requirements of the Statement of Work.
Weak (50% of points)	Proposal demonstrates that they minimally meet the requirements. Elements are missing or unclear.
Meets minimum passing requirement (70% of points)	Proposal clearly demonstrates that they meet the requirements. No elements are missing.
Exceeds passing requirement (100% of points)	Proposal includes clear and detailed information demonstrating that they meet all of the requirements. In addition, the proposal includes a rationale for each proposed idea.

R.3 – QUALIFICATIONS – SENIOR RESEARCHER (Minimum 105 points, Maximum 150 points):

The CV of each senior researcher proposed in M.2 will be evaluated as follows:

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

(Minimum 35 points, Maximum 50 points)

If more than one (1) senior researcher is proposed the points will be averaged across all of them to form a final score. However, the proposed resources that do not meet the minimum points will not be named in the contract.

	Academic Qualifications									
Name of Senior Researcher	High School (30 points)					Certifications / Training (Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences) Max 1 point	Publications (Academic papers, professional association articles, reports Max 1 point	Awards and Memberships (ie: AAPOR American Association for Public Opinion Research, etc.) Max 1 point		
	College – not relevant* (35 points)									
	College – relevant* (39 points)									
	University – not relevant* (44 points)									
	University – relevant* (47 points)									
	/30 pts	/35 pts	/39 pts	/44 pts	/47 pts	(Max 3 points, any combination of the above will receive maximum points)			Total Points	
									/50	
									/50	
Final Average Score (Average points for all Senior Researchers)									/50	

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

- b) **Work experience** – for each Senior Researcher proposed, the proposal should include the total number of months and years (ex. 6 years and 4 months) of relevant experience for each Senior Researcher.

(Minimum 70 points, Maximum 100 points)

If more than one (1) senior researcher is proposed, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

Name of Senior Researcher	Number of years overall of relevant experience					Total Points
	Less than 5 years 60 points	Equal to 5 years but less than or equal to 6 years 70 points	Greater than 6 years but less than or equal to 7 years 80 points	Greater than 7 years but less than or equal to 8 years 90 points	Greater than 8 years 100 points	
						/100
						/100
Final Average Score (Average points for all Senior Researchers)						/100

R.4 – SAMPLE PROJECTS – SENIOR RESEARCHER (Minimum 225 points – Maximum 450 points)

The sample projects submitted under Mandatory requirement M.3, will be evaluated under this point rated evaluation criteria.

Bidders are requested to use the following SAMPLE PROJECT FORMAT for each sample project submitted:

SAMPLE PROJECT FORMAT

SECTION I: BACKGROUND INFORMATION

- Sample Project Title:
- Client Name:
- Fieldwork start and end dates (month/year):
- Fieldwork Location:
- Sample Size:

Attestation: The proposal should include a brief attestation of performance signed by the client for each sample project submitted. The attestations should clearly reference the specific sample project and state that the work was conducted to the satisfaction of the client. A client attestation template is included as Appendix 1 to Annex "C".

SECTION II: SAMPLE PROJECT BACKGROUND

Describe your client's subject matter of the sample project. Include a description of the product/service/social issue and the target audience(s).

SECTION III: METHODOLOGY

Provide a summary of the methodology and describe how it responded to your client's objectives.

Sample project experience will be evaluated based on the following criteria:

If more than one (1) senior researcher is proposed, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

- a) The target audience of the sample project was with the Canadian adult general public or sub-groups of the Canadian adult population. **(Maximum 150 points)**

Name of Senior Researcher	Sample Project # 1 Yes 75 pts No 0 pts (no partial points will be allocated)	Sample Project # 2 Yes 75 pts No 0 pts (no partial points will be allocated)	Total Points
			/150
			/150
Final Average Score (Average points for all Senior Researchers)			/150

b) The subject matter of the sample projects should be related to quality of service, communication or policy and programs. **(Maximum 150 points)**

Name of Senior Researcher	Sample Project # 1 Yes 75 pts No 0 pts (no partial points will be allocated)	Sample Project # 2 Yes 75 pts No 0 pts (no partial points will be allocated)	Total Points
			/150
			/150
Final Average Score (Average points for all Senior Researchers)			/150

c) The senior researcher's relevant expertise in the 1) design and 2) analysis or reporting for the component of the study, is demonstrated through their role and contribution to the successful outcome of the two (2) sample projects submitted under Mandatory requirement M.3. **(Maximum 150 points)**

If more than one (1) senior researcher is proposed, the points will be averaged across all of them. However, the proposed resources that do not meet the minimum points will not be named in the contract.

Name of Senior Researcher	Sample Project # 1 Yes 75 pts No 0 pts (no partial points will be allocated)	Sample Project # 2 Yes 75 pts No 0 pts (no partial points will be allocated)	Total Points
			/150
			/150
Final Average Score (Average points for all Senior Researchers)			/150

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cy021.51019-181009

Buyer ID - Id de l'acheteur
cy021
CCC No./N° CCC - FMS No./N° VME

APPENDIX 1 to ANNEX "C"
CLIENT ATTESTATION TEMPLATE

Name of contractor: _____

Project title: _____

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

Signature

Date

ANNEX "D" SECURITY REQUIREMENTS CHECK LIST



Government of Canada /
 Gouvernement du Canada

Contract Number / Numéro du contrat 51019-18-1009
Security Classification / Classification de sécurité UNCLASSIFIED

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 Veterans Affairs Canada	2. Branch or Directorate / Direction générale ou Direction Service Delivery	
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 Qualitative research study of VAC Clients' experiences with the Rehabilitation program and/or Case Management services (sample size ~ 25 participants).		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.) <input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? <input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET <input type="checkbox"/>		TOP SECRET <input type="checkbox"/>
TRÈS SECRET <input type="checkbox"/>		TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) <input type="checkbox"/>
TRÈS SECRET (SIGINT) <input type="checkbox"/>		TRÈS SECRET (SIGINT) <input type="checkbox"/>

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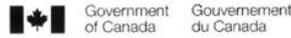
Security Classification / Classification de sécurité
UNCLASSIFIED

Canada

Solicitation No. - N° de l'invitation
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 51019-18-1009

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PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
 Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No Yes
 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
 Short Title(s) of material / Titre(s) abrégé(s) du matériel :
 Document Number / Numéro du document :

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET – SIGINT TRÈS SECRET – SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	Special comments: Commentaires spéciaux :		

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

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

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

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

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

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

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

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category Catégorie	PROTECTED PROTÉGÉ			CLASSIFIED CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL CONFIDENTIEL	SECRET	TOP SECRET TRÈS SECRET	NATO RESTRICTED NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET COSMIC TRÈS SECRET	PROTECTED PROTÉGÉ			CONFIDENTIAL	SECRET	TOP 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).

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Contract Number / Numéro du contrat 51019-18-1009
Security Classification / Classification de sécurité UNCLASSIFIED

PART D - AUTHORIZATION / PARTIE D - AUTORISATION			
13. Organization Project Authority / Chargé de projet de l'organisme			
Name (print) - Nom (en lettres moulées) Mary Nicholson	Title - Titre Director	Signature 	
Telephone No. - N° de téléphone 902-566-8758	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel mary.nicholson@canada.ca	Date 2018/10/31
14. Organization Security Authority / Responsable de la sécurité de l'organisme			
Kris McKinnon Personnel Security Officer Tel: 902.566.7167 Fax: 902.368.0722 Email: kristofer.mckinnon@canada.ca		Personnel Security Officer	Signature
		E-mail address - Adresse courriel kristofer.mckinnon@canada.ca	Date 2018/10/31
Information Guide) attached? / Les guides de renseignements sur la classification de la sécurité) sont-elles jointes?			<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
16. Procurement Officer / Agent d'approvisionnement			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date
17. Contracting Security Authority / Autorité contractante en matière de sécurité			
Name (print) - Nom (en lettres moulées)	Title - Titre	Signature	
Telephone No. - N° de téléphone	Facsimile No. - N° de télécopieur	E-mail address - Adresse courriel	Date

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité UNCLASSIFIED
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ANNEX "D" (Continued)
IT SECURITY GUIDE

Processing of Protected Information

Contract Security Requirements

IT Security
Veterans Affairs Canada

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1. Mandatory Introduction

This document outlines the IT Security requirements for the Department's current contract 51019-18-1009 for the processing of protected data up to and including Protected B. In absence of a formal Threat-Risk Assessment (TRA) and due to the IT portion of the Security clearance being contract specific, the intent of this document is to state the minimum safeguards required in order that the processing of protected information be approved by the Department's IT Security Coordinator (ITSC).

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

2. Mandatory Prerequisites

2.1 PWGSC Validation for Physical Security

The application of the security safeguards listed in this document are based on the *mandatory requirement* that the physical premises have been inspected, certified and accredited to process and store Protected B information by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services. The Departmental Security Officer's (DSO) office will validate the certification and notify the ITSC.

A CISD Field Industrial Security Officer (FISO) will perform a bi-annual inspection to ensure that premises PWGSC certification is maintained.

2.2 Personnel Security

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

2.3 Information Security

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

Transportation of information associated with this contract into or out of the physical premises must adhere to RCMP G1-009 "*Transport and Transmittal of Protected and Classified Information*". Personnel may only transport documents associated with a Veterans Affairs Canada contract into or out of the operational zones with the approval of the Veterans Affairs Canada DSO.

2.4 Security Policy Compliance Monitoring

On a frequency to be determined by the Safety, Security and Emergency Management Division (SSEMD), Veterans Affairs Canada retains the right to conduct inspections of the contractor's facility to ensure compliance with Government of Canada standards and policies with respect to the handling, storage and processing of protected information.

3. Minimum IT Security Requirements

3.1 IT Security Policy Compliance and Monitoring

On a frequency to be determined by Information Technology Services Division/Information Technology Security, Veterans Affairs Canada retains the right to conduct inspections of the contractor's facility to ensure compliance with Government of Canada standards and policies with respect to prevention, detection, response and recovery requirements as prescribed in the *Operational Security Standard: Management of Information Technology Security*.

3.2 Adherence to Government of Canada Policies

All information technology related operations must adhere to the overall requirements outlined in the *Operational Security Standard: Management of Information Technology Security*. Specifically, sections 16-18 referring to prevention, detection, response and recovery.

3.2.1 Prevention

Prevention safeguards protect the confidentiality, integrity, and availability of information and IT assets.

3.2.2 Physical Security within the IT Security Environment

The contractor will, as requested by the Veterans Affairs Canada ITSC, provide a list of physical safeguards which are implemented in the facility which is used to process and store protected information. All equipment processing protected information is to reside in an operation zone as defined by (RCMP – G1-026) *Guide to the Application of Physical Security Zones*".

The equipment within the operations zone, which is used to process the protected information, must be either standalone or on an 'island' network (self-contained, used for the purposes of processing the information related to the contract and have no external connection to the internet or other network, internal or otherwise).

The *island* network must only be used for the processing and storage of information related to contracts with the Veterans Affairs Canada and no other party.

The use of wireless technology for the processing of protected information is prohibited without the express written approval of the VAC DSO.

3.2.4 Storage, Disposal and Destruction of IT Media

All material such as CD/DVDs, flash/thumb drives, workstation hard disks, server hard disks, backup tapes and any other devices used to process or store protected information must be identified and itemized by model and serial number for hard disks, and by label for any other media which cannot be identified by model or serial number. These devices or material must be retained and properly stored or disposed of by Veterans Affairs Canada IT Security personnel in the event of failure and replacement of the equipment or termination of the final contract.

As requested, the Veterans Affairs Canada ITSC must be provided with the list of equipment and media being used. In addition, only equipment and media that has been identified, itemized and documented may be used to process protected information associated with the Veterans Affairs Canada contract.

In the event that equipment requires maintenance, support or replacement, no hardware associated with the processing or storage of protected information may be given to an outside vendor without the approval of the ITSC.

All media, when not in use, must be stored in a storage container which is RCMP-approved for the storage of information up to and including the Protected B level (G1-001 "*Security Equipment Guide*"). The storage container must be verified by CISD and validated by the Veterans Affairs Canada DSO's Office.

3.2.5 Authorization and Access Control

Within two weeks of contract award the contractor must provide the Veterans Affairs Canada ITSC with a list of all individuals who have access to the protected information being processed for the Department, along with the contractor's policies and procedures for adding individuals to the environment and the process followed when an individual is removed from the environment.

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

3.2.6 Mobile Computing and Teleworking

Due to the fact that the requirements have stipulated an island-network configuration, mobile computing and teleworking need not be expressly addressed; however, it is important to state that the processing of protected information associated with Veterans Affairs Canada-related contracts *may only* be performed in the facility which has been validated by the Veterans Affairs Canada DSO.

3.2.7 Emanations Security

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The highest level of information processed under this contract is Protected B, as such, there are no TEMPEST protection requirements at this time.

3.2.8 Telecommunications Cabling

In the event an island network is used (rather than standalone equipment), it is important to control and monitor access to telecommunications wiring, spaces and pathways to avoid inadvertent or deliberate connection to any other network.

3.2.9 Software Integrity and Security Configuration

The contractor should configure the security their operating systems and application software being used to process protected information in accordance with security best practices (such as the Microsoft Security Compliance Toolkits for servers and clients, Veterans Affairs Canada documentation. The contractor must implement safeguards to "harden" servers and workstations processing protected information, and detail that information in a document to be delivered to the Veterans Affairs Canada ITSC.

3.2.10 Malicious Code

Due to the isolation of the systems being used to process protected information (standalone or island network) these systems are less exposed to malicious code such as viruses, Trojan horses, and network worms; however, without proper procedures for introducing new equipment or information into the environment, they are still vulnerable. Therefore, the contractor must install, use and regularly update antivirus software and conduct scans on all electronic files from external systems.

3.2.11 Detection

It is important to have the ability to detect security related issues within the operating environment which processes protected information. Even though the systems are isolated, it is still useful to use sources such as system logs (event viewer), virus protection software and other system tools to monitor systems. In order to adequately protect information there must exist the ability to detect activity such as unauthorized access, unplanned disruption of systems or services or unauthorized changes to system hardware, firmware, or software. Detection mechanisms which are used by the contractor must be documented and provided to the Veterans Affairs Canada ITSC upon request.

3.2.12 Response and Recovery

3.2.12.1 Incident Response

The Policy on Government Security requires departments to 'establish mechanisms to respond effectively to IT incidents and exchange incident-related information with designated lead departments in a timely fashion'. Similarly, Veterans Affairs Canada requires the contractor to have a documented incident response process. All documentation pertaining to incident response must be provided to the Veterans Affairs Canada ITSC upon request.

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3.2.12.2 Incident Reporting

It is paramount that Veterans Affairs Canada's DSO and ITSC are made aware of any security-related incidents with respect to the facilities and equipment used to process and store protected information associated with Veterans Affairs Canada contracts.

The contractor must report any security-related incidents to the Veterans Affairs Canada DSO and ITSC within *two hours* of an incident being detected or reported.

3.2.12.3 Recovery

The ability to recover systems and information is extremely important in any IT environment. Veterans Affairs Canada requires the contractor to demonstrate the ability to address systems recovery by providing documentation relating to systems and server backup policies (e.g. processes used, tests restores, retention periods and storage of backup media). This documentation shall be forwarded to the Veterans Affairs Canada ITSC, upon request.

3.2.12.4

All data input, processing, storage, accessing, and electronic back-ups are to be domestically processed and stored in Canada.

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ANNEX "E"
to PART 3 OF THE BID SOLICITATION

ELECTRONIC PAYMENT INSTRUMENTS

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

() Direct Deposit (Domestic and International);

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ANNEX "F"
POLITICAL NEUTRALITY CERTIFICATION

Political Neutrality Certification

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

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

Signature

Date

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ANNEX "G"
PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST

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