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@international.gc.ca

**Department of Foreign Affairs, Trade and
Development (DFATD)**

Ministère des Affaires étrangères, commerce et
développement (MAECD)

**Request for Proposal
Demande de proposition**

proposal to: Department of Foreign Affairs Trade
and Development.

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 here to, the goods, services, and
construction listed herein and on any attached
sheets at the price(s) set out therefor.

Proposition à: Ministère des Affaires Étrangères,
commerce et développement

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 appendices ci-jointes,
les biens, services et construction énumérés ici
sur toute feuille ci-annexée, au(x) prix
indiqué(s).

Comments — Commentaires:

**THIS DOCUMENT CONTAINS A SECURITY
REQUIREMENT — LE PRÉSENT DOCUMENT
COMPORTE UNE EXIGENCE EN MATIÈRE DE
SÉCURITÉ**

Issuing Office – Bureau de distribution

Foreign Affairs, Trade and Development / Affaires
étrangères, commerce et développement
200 Promenade du Portage
Gatineau, QC

Title — Sujet:	
Uniquely customized phishing simulation initiative	
Solicitation No. — N° de l'invitation 19-145941	Date: November 16, 2018
Solicitation Closes — L'invitation prend fin	Time Zone — Fuseau horaire
At /à: 2:00 PM	EDT (Eastern Daylight Saving Time)
On / le December 28, 2018	
F.O.B. — F.A.B.	
Plant-Usine: <input type="checkbox"/> Destination: X Other — Autre: <input type="checkbox"/>	
Address Enquiries to — Addresser toutes questions à:	
Name : Brandon Hua	
E-Mail : Brandon.Hua@international.gc.ca	
Telephone No. – No de téléphone: (343) 203-1307	FAX No. – No de télécopieur :
Destination of Goods and or Services/Destination – des biens et ou services: Department of Foreign Affairs, Trade and Development (DFATD)/ Ministère des Affaires étrangères, commerce et développement (MAECD)	
Vendor/Firm Name and Address — Raison sociale et adresse du fournisseur/de l'entrepreneur:	
Telephone No. – No de téléphone:	FAX No. – No 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



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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

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.

List of Annexes to the Resulting Contract:

Annex A – Statement of Work

Annex B – Basis of Payment

Annex C – Security Requirements Check List (SRCL)

List of Attachments to Part 3 (Bid Preparation Instructions) :

Attachment 3.1: Bid Submission Form

List of Attachments to Part 4 (Evaluation Procedures and Basis of Selection):

Attachment 4.1: Bid Evaluation Criteria



1.2 Summary

- 1.2.1 This bid solicitation is being issued to satisfy the requirement of **Department of Foreign Affairs, Trade and Development Canada (DFATD)** for the provision of professional services in planning, design, testing, implementation, and reporting for three cycles of customized phishing simulation campaigns.

It is intended to result in the award of one (1) contract for one (1) years, plus two (2) one-year irrevocable options allowing Canada to extend the term of the contract.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the Contract Security Program of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website
- 1.2.3 The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).

1.3 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

- a) 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.
- b) 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.
- c) The [2003](#) (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.
- d) Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:
Delete: 60 days
Insert: 120 calendar days.



2.2 Submission of Bids

Bids must be submitted only to the Department of Foreign Affairs, Trade and Development (DFATD) Bid Inbox by the date, time and place indicated on page 1 of the bid solicitation. Bids **MUST NOT** be sent directly to the Contracting Authority. Bids sent directly to the Contracting Authority WILL NOT be considered.

Bids transmitted by facsimile (Fax) to DFATD 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 FPS, bidders must provide in writing before contract award for each question below, the answer and, as applicable, the information required.

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

Definitions

For the purposes of this clause,

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

Royal Canadian Mounted Police. A former public servant may be:

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

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

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

Former Public Servant in Receipt of a Pension

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

Yes () No ()

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



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

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

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive?

Yes () No ()

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) 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 Improvement of Requirement During Solicitation Period

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



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

a) **Copies of Bid:** Canada requests that bidders provide their bid in separately bound sections as follows:

- i. Section I: Technical Bid (one (1) electronic copy)
- ii. Section II: Financial Bid (one (1) electronic copy)
- iii. Section III: Certifications not included in the Technical Bid (one (1) electronic copy)

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

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

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

c) **Submission of Only One Bid from a Bidding Group:**

- i. The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will set aside all bids received from members of that bidding group.
- ii. For the purposes of this article, "**bidding group**" means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered "**related**" for the purposes of this bid solicitation if:
 - A. they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - B. they are "related persons" or "affiliated persons" according to the *Canada Income Tax Act*;
 - C. the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - D. the entities otherwise do not deal with one another at arm's length, or each of them does not deal at arm's length with the same third party.

d) **Joint Venture Experience:**

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

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



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

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

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

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

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

That show in total 100 billable days.

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

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.

The technical bid consists of the following:

- i. **Bid Submission Form:** Bidders are requested to include the **Bid Submission Form – Attachment 3.1** with their bids. It provides a common form in which bidders can provide information required for evaluation and contract award, such as a contact name, the Bidder's Procurement Business Number, the Bidder's status under the Federal Contractors Program for Employment Equity, etc. Using the form



to provide this information is not mandatory, but it is recommended. If Canada determines that the information required by the Bid Submission Form is incomplete or requires correction, Canada will provide the Bidder with an opportunity to do so.

ii. **Substantiation of Technical Compliance:**

The technical bid must substantiate the compliance with the specific articles of **Attachment 4.1** which is the requested format for providing the substantiation. The substantiation must not simply be a repetition of the requirement(s), but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work. Simply stating that the Bidder or its proposed solution or product complies is not sufficient. Where Canada determines that the substantiation is not complete, the Bidder will be considered non-responsive and disqualified. The substantiation may refer to additional documentation submitted with the bid - this information can be referenced in the "Bidder's Response" column of **Attachment 4.1**, where Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers; where the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

iii. **For Previous Similar Projects:** Where the bid must include a description of previous similar projects: (i) a project must have been completed by the Bidder itself (and cannot include the experience of any proposed subcontractor or any affiliate of the Bidder); (ii) a project must have been completed the bid closing date; (iii) each project description must include, at minimum, the name and either the telephone number or e-mail address of a customer reference; and (iv) if more similar projects are provided than requested, Canada will decide in its discretion which projects will be evaluated. A project will be considered "similar" to the Work to be performed under any resulting contract if the project was for the performance of work that closely matches the descriptions of the work in ANNEX A – Statement of Work. Work will be considered to "closely match" if the work in the provided project is described in at least 50% of the points of responsibility listed in the description of the work in ANNEX A – Statement of Work.

iv. **For Proposed Resources:** The technical bid must include résumés for the resources as identified in **Attachment 4.1**. The Technical bid must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:

- A. Proposed resources may be employees of the Bidder or employees of a subcontractor, or these individuals may be independent contractors to whom the Bidder would subcontract a portion of the Work
- B. For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource by the time of bid closing.
- C. For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of bid closing and must continue, where applicable, to be a member in good standing of the profession or membership throughout the evaluation period and contract period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this solicitation. If the entity is not specified, the issuer must be an accredited or otherwise recognized body, institution or entity.



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- D. For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal cooperative programme at a post-secondary institution.
- E. For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
- F. For work experience to be considered by Canada, the technical bid must not simply indicate the title of the individual's position, but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. In situations in which a proposed resource worked at the same time on more than one project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience .
- v. **Customer Reference Contact Information:** The Bidder must provide customer references who must each confirm, if requested by Canada the information required by Article 1 of **Attachment 3.1**. For each customer reference, the Bidder must, at a minimum, provide the name, the telephone number and e-mail address for a contact person. Bidders are also requested to include the title of the contact person. If there is a conflict between the information provided by the customer reference and the bid, the information provided by the customer reference will be evaluated instead of the information in the bid. If the named individual is unavailable when required during the evaluation period, the Bidder may provide the name and contact information of an alternate contact from the same customer.

Section II: Financial Bid

3.2 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.

3.3 Exchange Rate Fluctuation

SACC [C3011T](#) - Exchange Rate Fluctuation (2013-11-06)

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

Section III: Certifications

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



ATTACHMENT 3.1 – BID SUBMISSION FORM

Bidder's full legal name _____

Authorized Representative of Bidder for evaluation purposes
(e.g., clarifications)

1. Name: _____
2. Title: _____
3. Address: _____
4. Telephone # _____
5. Fax # _____
6. Email: _____

Bidder's Procurement Business Number (PBN)

The Bidder is required to certify to its status with FCP-EE, as follows:

The Bidder:

- is not subject to FCP-EE, having a workforce of less than 100 persons in Canada,
- is not subject to FCP-EE, being a regulated employer under the *Employment Equity Act*,
- is subject to the requirements of FCP-EE, having a workforce of 100 persons or more, but has not previously obtained a certificate number from HRDC-Labour, (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is provided herewith (attached);
- is subject to FCP-EE, and has a valid certification number as follows: _____ (e.g. has not been declared "Ineligible Contractor" by HRDC-Labour).

1.1 Former Public Servants

See the Article in Part 5 of the bid solicitation entitled Former Public Servant Certification for a definition of "Former Public Servant".

1. Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation?
 - o Yes
 - o No
2. If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"
3. Is the Bidder a FPS who received a lump sum payment under the terms of a work force reduction program?
 - o Yes
 - o No
4. If yes, provide the information required by the Article in Part 5 entitled "Former Public Servant Certification"



1.2 Status and Availability of Resources

On behalf of the bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:

1. The bidder considers itself and its products able to meet all the mandatory requirements described in the bid solicitation;
2. This bid is valid for the period requested in the bid solicitation;
3. All the information provided in the bid is complete, true and accurate; and
4. If the bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation.

Signature of Authorized Representative of Bidder

Status and Availability of Resources

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

Signature of authorized representative



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

4.1.1 Technical Evaluation

a) **Mandatory Technical Criteria :**

Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified. The Mandatory evaluation criteria are described in **Attachment 4.1 - Bid Evaluation Criteria**.

b) **Point-Rated Technical Criteria:**

Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly. The rated requirements are described in **Attachment 4.1 - Bid Evaluation Criteria**.

4.1.2 Financial Evaluation

For evaluation purposes only, the total cost shall be established as follows:

The total price of a bid will be the sum of the Bidder's quoted firm price, specified in **Annex B – Basis of Payment**, for the contract period.

4.1.2.1 **Mandatory Financial Criteria**

SACC Manual Clause [A0220T](#) (2014-06-26), Evaluation of Price

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

4.2 Basis of Selection

SACC Manual Clause [A0027T](#) (2012-07-16) Highest Combined Rating of Technical Merit and Price

1. **Combined Rating of Technical Merit [60%] and Price [40%]**

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 of points overall for the technical evaluation criteria which are subject to point rating.
2. Bids not meeting a, b and c will be declared non-responsive.



3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **60%** for the technical merit and **40%** for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of **60%**.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of **40%**.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available point equal 135 and the lowest evaluated price is \$45,000 (45).

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd



ATTACHMENT 4.1: BID EVALUATION CRITERIA

1. Evaluation Criteria

The proposal will be evaluated and scored in accordance with specific evaluation criteria as detailed herein. It is imperative that these criteria be addressed in sufficient depth in the proposal to fully describe the bidder's response.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirements will not be considered "demonstrated" for the purpose of this evaluation and will be deemed non-compliant. Cutting and pasting the experience into the resumes will not suffice.

The bidder should provide complete details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All requirements for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience as they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example: Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two projects references is seven (7) months. Bidders are asked to indicate on the resumes how many months/years are to be counted for each project.

For each criterion, details should be provided regarding the qualifications, relevant experience and expertise of the proposed personnel. For mandatory and point rated requirements, the experience of the proposed resource(s) must be clearly identified by providing a summary/description of the previous projects worked on and indicating when the work was carried out, and the client.

Curriculum vitae of the proposed resource must be provided. Also, the evaluation criteria matrix must be used to answer the mandatory and point rated criteria. Therefore, the answers are to be entered directly into the matrix, explaining how each criterion has been met, while referencing both the page and project numbers as indicated in the resume.

1.2 Mandatory Requirements

Proposals will be evaluated in accordance with the mandatory evaluation criteria as detailed herein. Bidders are advised to address each requirement in sufficient depth to permit a complete requisite analysis and assessment by the evaluation team. Proposals failing to adequately respond to the mandatory evaluation criteria will be excluded from further consideration. Only proposals found to meet the mandatory evaluation criteria will be evaluated in accordance with the evaluation criteria subject to point rating.



Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M1	The bidder must propose one (1) team for running anti-phishing campaigns.		
M2	The bidder must submit the proposed resource's Résumé.		
M3	The proposed resource must be a Canadian citizen holding a current, valid Government of Canada Security Clearance: Reliability status at the date and time of the RFP bid closing. Note: Bidders must provide security file number and date of birth of the proposed resource. For security reasons, the bidder must be Canadian controlled and resident in Canada.		



Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M4	<p>The bidder must demonstrate using detailed projects description that the proposed resource in the previous anti-phishing campaigns has experience sending unique, bilingual phishing simulation emails to at least 2000 users in three or more GoC Departments.</p> <p>For each previous project, the following information must be included:</p> <ul style="list-style-type: none">• Project Description• The role and responsibilities, degree of involvement including the actual length of time the proposed resource spent on the project.		
M5	<p>The bidder must demonstrate using detailed project descriptions that the proposed resource has hosted learning opportunity pages in both English and French in the previous anti-phishing campaigns.</p> <p>For each previous project, the following information must be included:</p> <ul style="list-style-type: none">• Project Description• The role and responsibilities, degree of involvement including the actual length of time the proposed resource spent on the project.		
M6	<p>The bidder must demonstrate using detailed project descriptions that the resource has experience producing executive reports on the metrics gathered in anti-phishing campaigns for at least three projects.</p> <p>For each previous project, the following information must be included:</p> <ul style="list-style-type: none">• Project Description• The role and responsibilities, degree of involvement including the actual length of time the proposed resource spent on the project.		



Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M7	<p>The Bidder must demonstrate, using detailed project descriptions, their experience within the last three (3) years, providing bilingual Simulated Phishing Services for two (2) projects.</p> <p>For each previous project, the bidder should demonstrate the following:</p> <ul style="list-style-type: none"> a) the full name of the client and the contact information; b) the dates and duration of each phishing campaign; c) information on the phishing simulations carried out; d) information on targeted phishing conducted as part of phishing services. <p>Simulated Phishing Services are described as; Delivery of a simulated phishing program, with multiple levels of difficulty in phishing scenarios (from the most commonly seen, to scenarios that are more creative) throughout a year, with training built into the program at the individuals level of understanding, complete with metrics and analytics to with a minimum of 400 employees</p> <p><u>Submission requirement</u> The bidder must clearly demonstrate the required experience by providing a maximum of two project descriptions for each project</p>		



Item	Mandatory Criteria	Met / Not Met	Cross Reference to Proposal
M8	<p>The Bidder must demonstrate by providing one (1) project description, their experience within the last three (3) years, providing Phishing Campaigns with Clients.</p> <p>For each previous project, the bidder should demonstrate the following:</p> <ul style="list-style-type: none"> • Experience of Simulated Phishing through SMS and phone calls; and • Experience of conducting spear phishing as part of Simulated Phishing <p>The project description must include the following:</p> <ul style="list-style-type: none"> e) Full name of the client with point of contact details; f) Dates and duration of the phishing campaign(s); g) Simulated Phishing through SMS and phone calls; and h) Spear Phishing as part of the Simulated Phishing Campaign 		
M9	<p>The Bidder must demonstrate by providing two (2) project description, their experience within the last three years, using data management for phishing campaigns.</p> <p>Each project description must include the following:</p> <ul style="list-style-type: none"> a) Full name of the client with point of contact details; b) Dates and duration of the phishing campaign c) Data management plan that depicts where and how the data will be obtained, used and stored; d) Plan to limit access to data to authorized personnel based on a need-to-know basis; and e) Plan to destroy/secure data and/or results from the Phishing Campaign <p>Note: Evidence of secure data storage in adherence to Government of Canada data privacy and data storage and residency policies which are;</p> <ul style="list-style-type: none"> i. Privacy Act ii. Personal Information Protection and Electronic Documents Act (Specific safeguards and regulations in <i>Part 6, Schedule 1</i>) iii. Government of Canada Cloud Adoption Strategy 		



1.2 Point Rated Requirements

Proposals will be evaluated and scored in accordance with specific evaluation criteria as detailed in this section. A bidder must obtain a minimum points required for the proposed resource in order to be considered responsive.

Details should be provided regarding the qualifications, relevant experience and expertise of the proposed personnel. The experience of the proposed resource should be clearly identified by providing a summary/description of the previous projects worked on and indicating when the work was carried out, and the client.

Bidders are advised that only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirements will not be considered “demonstrated” for the purpose of this evaluation. The bidder should provide complete details as to where, when (month and year) and how (through which activities/responsibilities) the stated qualifications/experience were obtained. Experience gained during formal education shall not be considered work experience. All requirements for work experience shall be obtained in a legitimate work environment as opposed to an educational setting. Co-op terms are considered work experience provided they are related to the required services.

Bidders are also advised that the month(s) of experience listed for a project whose timeframe overlaps that of another referenced project will only be counted once. For example, Project 1 timeframe is July 2001 to December 2001; Project 2 timeframe is October 2001 to January 2002; the total months of experience for these two project references is seven (7) months.

It is requested that for each of the criteria, bidder statements in this section make direct reference, project identifier, page number, to the supporting section(s) in the proposed resource's resume.



The summary of the maximum points to be awarded is summarized as following:

Item	Rated Criteria	Points allocation	Max. Points	Cross Reference to Proposal
R1	The bidder should demonstrate that the proposed resource has conducted at least one multi-lingual anti-phishing campaign for a diverse international audience in the private or public sectors.	No campaign = 0 points 1 campaign = 5 points 2 campaign = 10 points 3 campaign = 15 points 4 campaign = 20 points More than 5 campaign = 30 points <u>Minimum points required = 5 points</u>	/30	
R2	In addition to M6 The bidder should demonstrate that the proposed resource has experience running anti-phishing campaigns beyond the mandatory three projects as per mandatory criteria M6	4 to 10 projects = 10 points 11 or more projects = 20 points	/20	



Item	Rated Criteria	Points allocation	Max. Points	Cross Reference to Proposal
R3	<p>Experience in providing bilingual Simulated Phishing services</p> <p>In addition to M7, the Bidder should demonstrate, using two (2) additional project descriptions, their experience in providing simulated Phishing services delivered within the last three (3) years.</p>	<p>Client: Canadian Federal Government Entity: 15 points will be awarded for delivery of simulated phishing program</p> <p>Client: Public Sector Government (Municipal or Provincial): 10 points will be awarded for delivery of simulated Phishing program;</p> <p>Client: Private Sector Business: 5 points will be awarded for delivery of simulated phishing program;</p>	/30	
R4	<p>In addition to M8, the Bidder should demonstrate using two (2) additional project descriptions, their experience in:</p> <ul style="list-style-type: none"> i. Providing Simulated Phishing Campaigns through emails, SMS and phone calls; ii. Providing Simulated Spear Phishing <p>The project description must include the following:</p> <ul style="list-style-type: none"> a. Full name of the client with point of contract details; b. Dates and duration of the Phishing campaign(s); c. Simulated Phishing through SMS and phone calls; and d. Spear Phishing as part of the Simulated Phishing Campaign 	<p>The Bidder will receive up to ten (10) points for each project up to a maximum of two (2) projects that clearly demonstrates experience in criterion i and ii.</p>	/20	



Item	Rated Criteria	Points allocation	Max. Points	Cross Reference to Proposal
R5	<p>In addition to M9, the Bidder should demonstrate using two (2) additional project descriptions, their experience in:</p> <ul style="list-style-type: none"> i. Safeguarding data using electronic infrastructures and arrangements that adhere to Government of Canada guidance and regulations; ii. Protecting information and only disclose them on a need-to-know basis; iii. Restricted access to data and information; iv. Clearing and accordance with requirements outlined in ITSG-06: Clearing and Declassifying Electronic Data Storage Devices. <p>Note: Evidence of secure data storage in adherence to Government of Canada data privacy and data storage and residency policies which are;</p> <ul style="list-style-type: none"> a. Privacy Act b. Personal Information Protection and Electronic Documents Act (Specific safeguards and regulations in <i>Part 6, Schedule 1</i>) c. Government of Canada Cloud Adoption Strategy <p>The project description must include the following:</p> <ul style="list-style-type: none"> a. Full name of the client with point of contact details; b. Dates and duration of the phishing campaign c. Data management plan that depicts where and how the data will be obtained, used and stored; d. Plan to limit access to data too authorized personnel based on a need-to-know basis; and e. Plan to destroy/secure data and/or results from Phishing Campaign 	<p>The Bidder will receive up to ten (10) points for each project up to a maximum of two (2) projects that clearly demonstrates experience in criterion i - iv.</p>	/10	
<p>Minimum Passing mark is <u>75</u> points and <u>MUST</u> meet the R1 minimum points required (5 points)</p>			/110	



PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

5.1 Certifications and Additional Information Required with the Bid

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

5.1.1 Integrity Provisions – Declaration of Convicted Offences

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

5.2 Certifications and Information Required Precedent to Contract Award

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

5.3 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a



substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

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

5.4 Education and Experience

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

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

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

5.5 Certification of Language – Bilingual Essential

By submitting a bid, 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 fluent in English and French. The individual(s) proposed must be able to communicate orally and in writing in both English and French without any assistance and with minimal errors.



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;
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.

7.1 Statement of Work

The Contractor must provide a report for submission to the Minister of International Trade in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid entitled _____, dated _____.

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

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

7.2.2 Supplemental General Conditions

[4007](#) (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information, apply to and form part of the Contract.

7.3 Security Requirements

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

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of **PROTECTED A**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by the CISD/PWGSC.
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 up to the level of **PROTECTED A**.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
5. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex C;
 - b) *Industrial Security Manual* (Latest Edition).

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract award to _____.

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 2 additional 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 2 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 (To be inserted at contract award)

The Contracting Authority for the Contract is:

Name: _____

Title: _____

Organization: Department of Foreign Affairs, Trade and Development Canada

Address: 200 Promenade du Portage, Gatineau, Québec K1A 0G4, Canada

Telephone: _____ - _____ - _____

E-mail address: _____

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 (To be inserted at contract award)

The Project Authority for the Contract is:

Name: _____

Title: _____

Organization: Department of Foreign Affairs, Trade and Development Canada

Address: _____

Telephone: _____ - _____ - _____

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



Note to Bidders: The Contractor's Representative, Contracting Authority, Project Authority and contact information will be identified at the time of contract award.

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. Payment

7.7 Payment

7.7.1 Basis of Payment

For the Work described in Annex "A" - Statement of Work:

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price as per Annex "B" – Basis of Payment. Customs duties are included and Applicable Taxes are extra.

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



7.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed the amount set out on page one of the Contract, less any Applicable taxes. Customs duties are excluded and Applicable Taxes are extra.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work.

whichever comes first.

3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.3 Time Verification

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

7.8 Invoicing Instructions

1. 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.

OR

 - b. The original and one (1) copy must be forwarded to the following address for certification and payment.

_____ (Insert the name of the organization)

_____ (Insert the address of the organization)



7.9 Compliance with Certifications

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

7.10 Applicable Laws

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

7.11 Copyright in Material

In this section, "Material" means anything that is created by the Contractor as part of the Work under the Contract, that is required by the Contract to be delivered to Canada and in which copyright subsists, excluding any computer software code and all documentation manuals or guides intended to assist end users or technicians in respect of that code. "Material" does not include anything created by the Contractor before the award date of the Contract.

Copyright in the Material belongs to Canada and the Contractor must include the copyright symbol and either of the following notice on the Material: © Her Majesty the Queen in right of Canada (year) or © Sa Majesté la Reine du chef du Canada (année).

The Contractor must not use, copy, divulge or publish any Material except as is necessary to perform the Contract. The Contractor must execute any conveyance and other documents relating to copyright in the Material as Canada may require.

The Contractor must provide at the request of Canada a written permanent waiver of moral rights, in a form acceptable to Canada, from every author that contributed to the Material. If the Contractor is the author of the Material, the Contractor permanently waives its moral rights in the Material.

7.12 Certifications

Compliance with the certifications provided by the Contractor in its bid or any TA quotation is a condition of the Contract and subject to verification by Canada during the entire Contract Period. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor is untrue, whether made knowingly or unknowingly, Canada has the right, under the default provision of the Contract, to terminate the Contract for default.

7.13 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions 2003 (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (h) the Contractor's bid dated _____.



7.14 Limitation Of Liability – Information Management/Information Technology

- a. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this Article, even if it has been made aware of the potential for those damages.
- b. **First Party Liability :**
 - i. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to :
 - A. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
 - B. physical injury, including death.
 - ii. The Contractor is liable for all direct damages affecting real or tangible personal property owned, possessed, or occupied by Canada.
 - iii. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
 - iv. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (i.A) above.
 - v. The Contractor is also liable for any other direct damages to Canada caused by the Contractor in any way relating to the Contract, including :
 - A. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including any applicable taxes) for the goods and services affected by the breach of warranty; and
 - B. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (B) of the greater of [.75] times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the cell titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under paragraph (v) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00 , whichever is more.
 - vi. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent backup kept by Canada. Canada is responsible for maintaining an adequate backup of its records and data.



c. Third Party Claims :

- i. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.
- ii. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (i), with respect to special, indirect, and consequential damages of third parties covered by this Section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- iii. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph c.



ANNEX "A" - STATEMENT OF WORK

1. Background

Similar to many enterprises and government departments world-wide, phishing remains a serious problem at the Department of Foreign Affairs, Trade and Development Canada (DFATD). Due to the increasingly sophisticated phishing campaigns distributed by cyber threat actors through email, text, and social media accounts, too many people working in the Department continue to be deceived.

Therefore, the Department aims to increase its ability to protect itself against cyber threats, specifically phishing. To do this, the Department must achieve the following:

- Increased ability to detect and report phishing.
- Greater awareness of the potential consequences of successful phishing attacks.
- Greater understanding that each person is responsible for protecting the Department's cyber security posture and reputation.

The Department has a linguistically and culturally diverse workforce of approximately 10,000 employees who are distributed across the globe. Canada has 178 missions in 110 countries. The Department's services and programs are extensive and include an international agenda; consular services for Canadians; and international assistance and poverty alleviation. For additional information about the Department, see DFATD.

In order to increase the overall capacity to mitigate the threat of phishing, the Department seeks to outsource, to a suitable and qualified vendor, a uniquely customized phishing simulation initiative.

2. Objective

This initiative includes the planning, design, testing, implementation, and reporting for three cycles of customized phishing simulation campaigns per fiscal year. The selected vendor is expected to have sufficient resources to provide the end-to-end solution.

The selected vendor will be expected to collaborate with security experts at the Department and review previous initiatives to develop the new campaign.

The distribution of simulated phishing attack email messages should help the Department to assess cyber security readiness as it related to detecting phishing. When people click on something in the email, they will be provided with an instant learning opportunity by being re-directed to a web page that provides awareness and instructional information. The data collected will produce statistics that will allow us to evaluate our state of readiness against real attacks.

3. Scope of Work

The vendor will provide a fully managed service with the following tasks:

- Create Weekly status reports.
- Create a library of simulated phishing attack email messages appropriately matched to the target audience and varying in level of sophistication.
- Create a customizable phishing messages, provided in French and English.
- Create customizable learning opportunities (messages) provided in French and English. See Appendix S1.



-
- Build reports containing raw data: email addresses; browser/platform; date and time items were clicked; and the particular simulated phishing email that was clicked. See Appendix S2.
 - Technical testing (dry run) before each phase of the campaign.
 - Trusted domains that are controlled and managed.
 - Secure data storage in adherence to Government of Canada data privacy and data storage and residency policies.
 - Provide raw data at the conclusion of each campaign.
 - Handover and Closure report.

4. Deliverables

The Contractor must submit all deliverables in a timely manner and in accordance with the specified delivery dates. If the specified time frames and deliverables will not be met, the Contractor is required to submit a written report providing reasons for the delay at least ten (10) days in advance of the due date to the project authority, explaining the reasons for the delay and outlining mitigation strategies to ensure that the delay will not impact the overall project completion date.

The Contractor will produce the following deliverables:

1. A well-communicated methodology aimed at obtaining results.
2. Provide Weekly status reports.
3. Provide a library of simulated phishing attack email messages appropriately matched to the target audience and varying in level of sophistication.
4. Provide phishing messages, provided in French and English.
5. Provide customizable learning opportunities (messages) provided in French and English in reference to Appendix S1
6. Provide detailed reports of analyzed data for a variety of audiences and purposes containing raw data: email addresses; browser/platform; date and time items were clicked; and the particular simulated phishing email that was clicked in reference to Appendix S2.
7. Provided trusted domains that are controlled and managed.
8. Provide Secure data storage in adherence to Government of Canada data privacy and data storage and residency policies.
9. Provide raw data at the conclusion of each campaign.
10. Handover and Closure report.



5. Schedule/Milestones

The vendor will be expected to provide at least three campaigns during the initial contract period.

Item	Task	Details	OPI
1	Identify Target Audience & Project Scope	GAC will provide CSV list of email addresses, departmental symbols and name of staff members and organization mailboxes.	Vendor/ GAC
2	Preparation	For each of the three campaigns: Target Audience data loaded into system, grouped as required.	Vendor
3	Create Customized Library	For each of the three campaigns: Create a library of relevant simulations based on results on in each campaign. (For example, previous clickers will receive a simulation of lesser complexity than previous non-clickers.)	Vendor
4	Create Learning Opportunity Page	For each of the three campaigns: Learning Opportunity Page will be created, in English and French, with GAC branding. The page must include a feature that requires users to indicate that they have read the material provided, for example, click an "I have read" button. In addition, there will be hyperlinks to the GAC intranet.	Vendor
5	Whitelisting	For each of the three campaigns: Vendor will propose domains and provide whitelist details. GAC will whitelist.	GAC
6	Seek Approvals; Conduct Test	For each of the three campaigns: With Approved simulations and landing page we will run a test simulation to small select group (Generally 10 employees within the designated leads organization) to ensure that the learning moments are optimized for all the clients relevant browsers (i.e. Blackberry, IE 8 etc...).	Vendor
7	Execute Campaign	For each of the three campaigns: Deliver simulation phishing emails to all email addresses provided.	Vendor
8	Provide interim results	For each of the three campaigns: Provide a CSV file with the email addresses of the clickers, date/time, email subject and browser details.	Vendor
9	Executive Report	Executive Report on the metrics gathered is delivered – includes a roll-up with previous results and comparable to the previously established Baselines.	Vendor



6. Acceptance Criteria

The work will be considered acceptable under the following conditions:

1. Successful delivery of emails to at least 98% of all users
2. Raw data delivery within 2 weeks of running each campaign
3. Executive report delivery within 3 weeks of the final campaign.

7. Location of Work, Work Site and Delivery Point

The selected vendor for the Simulated Phishing Campaign will perform a majority of the work at its own facility. The vendor will be required to meet at a DFATD Headquarters at 125 Sussex Drive, Ottawa, Ontario.

- Weekly status and review meetings (day and time TBD)
- Final reporting and debrief

8. Language of Work

The final reports must be prepared in English.



Appendix S1: Learning Opportunities

When someone clicks on a simulated phishing email (falls victim to the deception) they will be directed to learning opportunities, which will be distributed through web-based messages.

Learning opportunities will

- Be provided in real-time (directly after someone clicks on the phishing email).
- Take up to a maximum of one minute to read/review.
- Inform user that the email was part of a simulated phishing attack.
- Identify the elements of the message that were clues that it was phishing.
- Provide tips on how to detect and report phishing emails.
- Provide or link to best practices on how to avoid falling victim to future phishing attacks.
- Include a feature that requires users to indicate that they have read the learning material provided, for example, to click an “I have read” button.

Be aware of the consequences

It is important for staff to be aware of the potential consequences if they fall victim to the deception of well-crafted messages and allow a successful phishing attack.

A successful phishing attack has these potential consequences:

- malware infection of SIGNET machines or your personal devices;
- corruption or loss of departmental or personal information;
- complete shutdown of the Department's network;
- disruption of departmental business and reduction in service delivery;
- embarrassment or identity theft for the person who fell victim;
- embarrassment to our department; or
- waste of resources (human and financial) to recover from an attack.

Even worse, sensitive information in the wrong hands could potentially put our staff or partners in physical danger.

Understand your responsibility

It is important for staff members to understand that they must do their part to prevent successful phishing attacks. Their awareness, vigilance, and actions are vital to preventing successful phishing attacks that protect the reputation and overall cyber security posture of the Department.



Appendix S2: Reporting Requirements

Upon completion of each campaign, the vendor is required to produce an interim report, which will include an analysis and statistical summaries of the findings. Interim reports will contain email addresses; browser/platform; date and time items were clicked; the particular simulated phishing email that was clicked; and the results of the learning opportunity “I have read” feature.

Upon completion of the entire cycle, the vendor is required to produce an executive report, which will include an analysis and statistical summaries of the findings.

Examples of reports required:

- Number of users who clicked, delivered as an aggregate number (excluding individual results).
- Number of users who did not click, delivered as an aggregate number.
- Results by region, branch, and directorate, and additional parameters to be determined.
- Click rate: Number of users that clicked 0 campaigns; 1 campaigns; 2 campaigns; and 3 or more campaigns.
- Susceptibility comparables or benchmarking against trends for each campaign. We will provide comparables for each campaign against our historical averages with other Government of Canada departments and campaigns of similar size.
- Browser Report: Our reporting captures the browser type used for each click
- Progressive metrics against the baseline: The report will compare the results to each of the three campaigns.



ANNEX “B” - BASIS OF PAYMENT

Payments will be made in accordance with the Contract as follows:

Contract Period

Contract award to March 31st 2020			
No.	Description	Firm Amount (all-inclusive)	Completion Date
1	All professional services and deliverables as specified in the Statement of Work Campaign 1	\$	TBD at contract award
2	All professional services and deliverables as specified in the Statement of Work Campaign 2	\$	TBD at contract award
3	All professional services and deliverables as specified in the Statement of Work Campaign 3	\$	TBD at contract award
4	All professional services and deliverables as specified in the Statement of Work Campaign 4	\$	TBD at contract award
5	All professional services and deliverables as specified in the Statement of Work End of campaign cycle report	\$	TBD at contract award
Estimated total – Contract period (tax excluded)		\$	



Option Period 1

April 1st 2020 to March 31st 2021			
No.	Description	Firm Amount (all-inclusive)	Completion Date
1	All professional services and deliverables as specified in the Statement of Work Campaign 1	\$	TBD at contract award
2	All professional services and deliverables as specified in the Statement of Work Campaign 2	\$	TBD at contract award
3	All professional services and deliverables as specified in the Statement of Work Campaign 3	\$	TBD at contract award
4	All professional services and deliverables as specified in the Statement of Work Campaign 4	\$	TBD at contract award
5	All professional services and deliverables as specified in the Statement of Work End of campaign cycle report	\$	TBD at contract award
Estimated total – Option period 1 (tax excluded)		\$	



Option Period 2

April 1st 2021 to March 31st 2022			
No.	Description	Firm Amount (all-inclusive)	Completion Date
1	All professional services and deliverables as specified in the Statement of Work Campaign 1	\$	TBD at contract award
2	All professional services and deliverables as specified in the Statement of Work Campaign 2	\$	TBD at contract award
3	All professional services and deliverables as specified in the Statement of Work Campaign 3	\$	TBD at contract award
4	All professional services and deliverables as specified in the Statement of Work Campaign 4	\$	TBD at contract award
5	All professional services and deliverables as specified in the Statement of Work End of campaign cycle report	\$	TBD at contract award
Estimated total – Option period 2 (tax excluded)		\$	

TO A POTENTIAL ESTIMATED MAXIMUM OF [insert at contract award] (applicable taxes excluded)

The levels of effort in the table below is for estimates only and is to be used to calculate the total price of the proposal. Bidders must enter a firm price (applicable sales taxes excluded) or firm all-inclusive price, as applicable, for the term of the contract.

Payment term

Upon completion of each Phishing Campaign and project authority acceptance.



ANNEX "C" - SECURITY REQUIREMENTS CHECK LIST



Government of Canada
Gouvernement du Canada

Contract Number / Numéro du contrat 19-145941
Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL) LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE	
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine GAC	2. Branch or Directorate / Direction générale ou Direction CSC
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 CSCI Corporate IT Security is seeking a contractor to conduct Department-wide Anti-Phishing campaigns. The campaigns' objective is to raise SIGNET users' awareness to phishing.	
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"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <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:
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 B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
	PROTECTED C / PROTÉGÉ C <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"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité





Government of Canada
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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
Non Oui

If Yes, indicate the level of sensitivity:
Dans l'affirmative, indiquer le niveau de sensibilité :

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

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

Document Number / Numéro du document :

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

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

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

Special comments:
Commentaires spéciaux : _____

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

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

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No Yes
Non Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



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Gouvernement du Canada

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Security Classification / Classification de sécurité

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).