



**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

Proposal to / Propositions aux:

Statistics Canada / Statistique Canada

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

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

**Solicitation No – N° de l'invitation :**

J022638/A

**Solicitation closes – L'invitation prend fin**

At – à : 14:00 EDT

On – le : December 19, 2018

**Update – Mise à jour :**

**Name and title of person authorized to sign on behalf of vendor (type or print) – Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'impression).**

**Name – Nom :**

**Title – Titre :**

**Date of Solicitation – Date de l'invitation:**

November 30, 2018

**Address inquiries to – Adresser toute demande de renseignements à:**

[statcan.macs-bids-smc-soumissions.statcan@canada.ca](mailto:statcan.macs-bids-smc-soumissions.statcan@canada.ca)

**Area code and Telephone No.**

**Code régional et N° de téléphone**

(613) 882-1902

**Facsimile No.**

**N° de télécopieur**

N/A

**Destination**

MACS BID

[statcan.macs-bids-smc-soumissions.statcan@canada.ca](mailto:statcan.macs-bids-smc-soumissions.statcan@canada.ca)

**Instructions :**

Municipal taxes are not applicable.

Unless otherwise specified herein by the Crown, all prices quotes are to be net prices in Canadian funds including Canadian customs duties, excise taxes, and are to be F.O.B., including all delivery charges to destination(s) as indicated. The amount of the Goods and Services Tax is to be shown as a separate item.

**Instructions:**

Les taxes municipales ne s'appliquent pas.

Sauf indication contraire, énoncée par la Couronne, dans les présentes, tous les prix indiqués sont des prix nets, en dollars canadiens, comprenant les droits de douane canadiens, la taxe d'accise et doivent être F.A.B., y compris tous frais de livraison à la (aux) destination(s) indiquée(s). La somme de la taxe sur les produits et services devra être un article particulier.

**Delivery required – Livraison exigée**

**Delivery offered – Livraison proposée**

**Vendor Name and Address – Raison sociale et adresse du fournisseur**

**Facsimile No – N° de télécopieur :**

**Telephone No – N° de téléphone :**

**Signature**

**Date**



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## **PART 1 - GENERAL INFORMATION**

### **1.1 Security Requirements**

There is no security requirement applicable to the Contract.

### **1.2 Statement of Work**

The Work to be performed is detailed under the Statement of Work at Annex A.

### **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.

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. You have the option of raising issues or concerns regarding the solicitation, or the award resulting from it, with the OPO by contacting them by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca). You can also obtain more information on the OPO services available to you at their website at [www.opo-boa.gc.ca](http://www.opo-boa.gc.ca).



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## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

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

The [2003](#) (2018-05-22) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.2 of Standard Instructions - Goods or Services - Competitive Requirements 2003 is amended as follows:

Delete: (d) send its bid only to Public Works and Government services Canada (PWGSC) Bid Receiving Unit specified on page 1 of the bid solicitation or to the address specified in the bid solicitation

Insert: (d) send its bid only to Statistics Canada Bid Receiving Unit specified on page 1 of the bid solicitation or to the address specified in the bid solicitation

In the complete text content (except Subsection 1.0, Subsection 3.0, and Subsection 20): Delete "Public Works and Government Services Canada" and Insert "Statistics Canada". Delete "PWGSC" and Insert "StatCan".

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 90 days

### 2.2 Submission of Bids

Bids must be submitted only to Statistics Canada (StatCan) by the date, time and place indicated on page 1 of the bid solicitation.

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

### 2.3 Former Public Servant

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



## Definitions

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

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

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

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

## Former Public Servant in Receipt of a Pension

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

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

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

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

## Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;



- 
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

#### **2.4 Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than 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.



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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted.

Canada requests that bidders provide their bid in separately bound sections as follows:

- Section I: Technical Bid: one (1) soft copy by e-mail in a "pdf" format;
- Section II: Financial Bid: one (1) soft copy by e-mail in a "pdf" format;
- Section III: Certifications: one (1) soft copy by e-mail in a "pdf" format;

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

#### Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

#### Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment provided in Annex B of this bid solicitation.

##### 3.1.1 Electronic Payment of Invoices – Bid

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

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

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

##### 3.1.2 Exchange Rate Fluctuation

C3011T (2013-11-06), Exchange Rate Fluctuation

#### Section III: Certifications

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



**PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

**4.1 Evaluation Procedures**

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

**4.1.1 Technical Evaluation**

**4.1.1.1 Mandatory Technical Criteria**

Item	Requirement	Met	Not Met	Cross reference to proposal
M1	<p>The Bidder must have completed three (3) market segmentation projects within the past five (5) years where their client's users/customers/clients were divided into segments.</p> <p>At a minimum, the Bidder must include the following information per project;</p> <ol style="list-style-type: none"> <li>1. Project Description;</li> <li>2. Scope of the Project;</li> <li>3. Project Deliverables;</li> <li>4. Project start/end dates and duration, providing period of time over which the experience was acquired, in the format: (month/year) to (month/year); and</li> <li>5. Client name for which the services were rendered, as well as the name and current business e-mail address and/or business telephone number for the client's delegated representative who would be able to confirm the information provided by the Bidder.</li> </ol> <p>Descriptions should be no more than two (2) pages per project</p> <p>Bidders are requested to refer to R1 when responding to this criterion</p>			



**4.1.1.2 Point Rated Technical Criteria**

Number	Point Rated Technical Criterion	Evaluation Factors	Maximum Points
R1	<p>The Bidders should demonstrate experience in market segmentation.</p> <p>The information provided in response to M1 will be used to evaluate this criterion.</p> <p>Minimum pass mark: 18/30</p> <p>Maximum available points: 10 points per project for a maximum of 30 points</p>	<ol style="list-style-type: none"> <li>1. Project experience working with other entities with similar web presence (2.5 points per project)</li> <li>2. Project experience recommending to other entities in a similar business posture (2.5 points per project)</li> <li>3. Project experience similar in scope to the StatCan SoW (2.5 points per project)</li> <li>4. Projects method and approach (2.5 points per project)</li> </ol>	<b>/30</b>
<b>Total points – technical rated criteria</b>			<b>/30</b>

Scoring Scale		
Percentage Factor	Rating Level	Descriptive Adjective
1	Meets the desirable maximum	(excellent)
0.9	Substantially exceeds the desirable minimum	(very good)
0.8	Slightly exceeds the desirable minimum	(good)
0.7	Just meets the desirable minimum	(acceptable)
0.6	Just fails the desirable minimum	
0.5	Slightly below the desirable minimum	
0.4	Substantially below the desirable minimum	
0.3 0.2 0.1	Absolutely inadequate, depending on degree of inadequacy	
0	NIL	

**4.1.2 Financial Evaluation**

SACC Manual Clause [A0222T](#) (2014-06-26), Evaluation of Price

**4.2 Basis of Selection - Highest Combined Rating of Technical Merit and Price**

1. To be declared responsive, a bid must:
  - a. comply with all the requirements of the bid solicitation; and
  - b. meet all mandatory criteria; and



- c. obtain the required minimum of 18 points overall for the technical evaluation criteria which are subject to point rating.  
The rating is performed on a scale of 30 points.
2. Bids not meeting (a) or (b) or (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 points equals 135 and the lowest evaluated price is \$45,000 (45).

<b>Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)</b>				
		<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>		115/135	89/135	92/135
<b>Bid Evaluated Price</b>		\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
	<b>Pricing Score</b>	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
<b>Combined Rating</b>		83.84	75.56	80.89
<b>Overall Rating</b>		1st	3rd	2nd



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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

### 5.1 Certifications Required with the Bid

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

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

### 5.2 Certifications Precedent to Contract Award and Additional Information

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

#### 5.2.1 Integrity Provisions – Required Documentation

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

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

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

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



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## PART 6 - RESULTING CONTRACT CLAUSES

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

### 6.1 Security Requirements

There is no security requirement applicable to the Contract.

### 6.2 Statement of Work

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

### 6.3 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.

#### 6.3.1 General Conditions

[2010B](#) (2018-06-21), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

### 6.4 Term of Contract

#### 6.4.1 Period of the Contract

The period of the Contract is from date of Contract to March 31, 2019.

### 6.5 Authorities

#### 6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Francesco Germano

Title: Coordinator

Organization: Statistics Canada

Address: 150 Tunney's Pasture Driveway, Ottawa, Ontario K1A 0T6

Telephone: 613-882-1902

E-mail address: [statcan.macs-bids-smc-soumissions.statcan@canada.ca](mailto:statcan.macs-bids-smc-soumissions.statcan@canada.ca)

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

#### 6.5.2 Project Authority (*To be inserted at Contract Award*)

The Project Authority for the Contract is:

Name:

Title:

Organization:



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.

### 6.5.3 Contractor's Representative (*To be inserted at Contract Award*)

Name:  
Title:  
Organization:  
Address:  
Telephone:  
E-mail address:

### 6.6 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.

### 6.7 Payment

#### 6.7.1 Basis of Payment

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work, in accordance with the Basis of Payment in Annex B.

#### 6.7.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ \_\_\_\_\_.  
Customs duties are included 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% committed, or
  - b. four 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.

### 6.7.3 Milestone Payment

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

- a. an accurate and complete claim for payment using [PWGSC-TPSGC 1111](#), Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form [PWGSC-TPSGC 1111](#) have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

### 6.7.4 Electronic Payment of Invoices – Contract

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI).

### 6.8 Invoicing Instructions

1. The Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](#), Claim for Progress Payment – Annex C.

Each claim must show:

- a. all information required on form [PWGSC-TPSGC 1111](#);
  - b. all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;
  - c. the description and value of the milestone claimed as detailed in the Contract.
2. Applicable Taxes, must be calculated on the total amount of the claim before any holdback is applied. At the time the holdback may be claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.
  3. The Contractor must prepare and certify the claim on form [PWGSC-TPSGC 1111](#), and forward a paper or electronic copy to the following parties for appropriate certification and payment after inspection and acceptance of the Work takes place:
    - a. One (1) copy (paper or electronic) must be forwarded to the address below for certification and payment:

Financial & Administrative Service Division  
Statistics Canada



RH Coats Bldg., (RHC7A)  
100 Tunney's Pasture Driveway  
Ottawa, ON, K1A 0T6  
Canada  
Email: [statcan.financecounter-comptoirfinance.statcan@canada.ca](mailto:statcan.financecounter-comptoirfinance.statcan@canada.ca)

- b. One (1) copy (paper or electronic) must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.
4. The Contractor must not submit claims until all work identified in the claim is completed.

## 6.9 Certifications and Additional Information

### 6.9.1 Compliance

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

### 6.10 Applicable Laws

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

### 6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the general conditions 2010B (2018-06-21), Professional Services (Medium Complexity);
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Claim for Progress Payments
- (f) the Contractor's bid dated \_\_\_\_\_.

### 6.12 Insurance

SACC *Manual* clause G1005C (2016-01-28) Insurance

### 6.13 Foreign Nationals (Canadian Contractor)

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

### 6.14 Dispute Resolution Services

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (1) of the *Department of Public Works and Government Services Act* will, on request, and consent of the parties, to participate in an alternative dispute resolution process to resolve any dispute between the parties respecting the interpretation or application of a term and condition of this contract and their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).



## 6.15 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (1) of the *Department of Public Works and Government Services Act* will review a complaint filed by (the supplier or the contractor or the name of the entity awarded this contract) respecting administration of this contract if the requirements of Subsection 22.2 (1) of the *Department of Public Works and Government Services Act* and Sections 15 and 16 of the *Procurement Ombudsman Regulations* have been met, and the interpretation and application of the terms and conditions and the scope of the work of this contract are not in dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at [boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).



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## ANNEX A STATEMENT OF WORK

### SW.1.0 TITLE

Market Segmentation expert - Statistics Canada users and potential users

### SW.2.0 BACKGROUND

Statistics Canada is the centralized statistical agency for Canadian socio-economic and business data. Under the *Statistics Act*, Statistics Canada is required to collect, compile, analyze, abstract and publish statistical information relating to the commercial, industrial, financial, social, economic and general activities and condition of the people of Canada. This information, which includes data tables, publications, and survey documentation, is derived from the Census of Population in addition to hundreds of surveys.

### SW.3.0 OBJECTIVES

Statistics Canada (StatCan) is seeking to further increase the use of its data and other outputs. In order to determine the most effective strategies, StatCan is seeking a Contractor to assist StatCan to better understand its current users and non-users.

StatCan requires that its current users and people who are not users of StatCan's services to be categorised according to characteristics they have in common with one another, that differentiate them from other categories of users, and to gain additional insight into needs, wants and pain points of different market segments.

StatCan requires the following information:

1. Based on the Contractor's experience and understanding of the characteristics of the market segments, and from the perspective of using StatCan's data, what are the different market segments, their characteristics and "personas".
2. Which StatCan products and services each category uses.
3. How frequently and when each category obtains StatCan's data and products.
4. If and how each category currently interacts with StatCan (e.g. Phone, web, mobile, email, social media, API).
5. If and how, based on the Contractor's knowledge, each segment *would like* to interact with StatCan in the future.
6. If and how each category obtains StatCan's data or products (e.g. API, visiting the website, clicking on links in emails, etc.).
7. If and how, based on the Contractor's knowledge each segment *would like* to obtain StatCan data in the future.
8. Based on the Contractor's experience and understanding of the characteristics of the market segments, what would be cost effective changes StatCan could consider to expand the use of StatCan's data and services by each of the segments. That is, how could StatCan efficaciously increase the use among current users, and expand the use of its products among segments that seldom or never make use of StatCan's data and other outputs?



## **SW.4.0 PROJECT REQUIREMENTS**

### **SW.4.1 Requirements, Tasks, and Deliverables**

#### **SW.4.1.1 Requirements**

Statistics Canada is seeking a marketing and market segmentation contractor to assist their in-house Dissemination team. Applicants should have the following experience as minimum requirements:

1. Experience doing market segmentation.
2. Aptitude and experience in analyzing and evaluating web site and other types of data in order to characterize and quantify the interactions of each user segment.
3. Strong interpersonal skills and the ability to clearly communicate information – both verbal and written – to diverse audiences.
4. Knowledge of the measurement, analysis and reporting of web site traffic for the purpose of understanding visitor behavior.
5. Experience recommending strategies to expand the base of users, and to increase satisfaction among existing user segments.

#### **SW.4.1.2 Tasks**

The following is a description of the work to be completed.

1. Gather and conduct a preliminary evaluation of potential data sources to facilitate segmentation of existing users, and non-users of StatCan data. For example, the Contractor's own market segmentation data, outputs from StatCan's Adobe analytics, summary of call logs to our help lines, an evaluation of subscribers to the agency's "My StatCan" service, logs describing the use of the agency's APIs, etc.
2. Evaluate the data sources fitness for use and negotiate a data analysis plan with the project authority to realize the contract's objectives.
3. Analyze existing data.
4. Propose all market segments appropriate for StatCan's context that cover all current users as well as segments that are not currently StatCan users. That is, StatCan's current users should be segmented into distinct personas, and non-users should also be segmented into distinct personas to permit an evaluation of which personas/segments could likely be induced to become StatCan data users, or to determine what changes StatCan can make to better meet the needs of non-users.
5. Create personas for each segment.
6. Associate the data from earlier steps to each segment to facilitate an understanding of how each segment currently makes use of StatCan data.
7. Prepare a written report that addresses the objectives.
8. Present the report to the project authority and answer questions.



9. Based on the Contractor's knowledge of the different market segments, and what has worked effectively for other clients, discuss potential enhancements StatCan could make to its existing website or other outreach mechanisms with StatCan.
10. Write a report of recommendations that if implemented would increase use among StatCan's existing users and expand use among segments not currently using StatCan data or products.

#### **SW.4.1.3 Deliverables**

The contractor must provide a draft of all materials one week prior to completion date to allow for review by the Project Authority.

Upon completion, the contractor will provide a report of the results along with an executive summary, in electronic format, that must include the following:

1. A report that addresses the objective from section 3, including personas of market segments that are tailored to explain how each uses (or not) StatCan data and services.
2. Information to permit an understanding on what data each segment currently uses, how frequently, and how they obtain it.
3. Recommendations on what StatCan could do in order to increase the use of its data among each segment.

#### **SW.4.1.4 Expected outcomes:**

StatCan will use this information and input to significantly increase our unique number of users, including among market segments that are not currently making frequent use of StatCan's products and services. In addition, StatCan plans to implement changes and adopt strategies to significantly increase the overall number of products and services used when compared to number of data tables and statistical services being used today. We intend to connect with more users, and provide them with the high quality information StatCan produces. We expect this allows them to take improved, evidenced based decisions which will lead to enhanced outcomes.

#### **SW.4.1.5 Constraints**

Additional information about Statistics Canada website metrics:

1. Statistics Canada collects metrics using Adobe Analytics from the whole website. This had been implemented on June 2<sup>nd</sup>, 2018 on most servers, but a few gaps exist for some items.
2. To have access to Statistics Canada's web metrics, the contractor needs to complete a free two-day course organized by Service Canada (Principal Publisher) in order to gain access to the tool and its content.
3. Overall, the Statistics Canada website contains millions of pages both static and dynamically-generated.
  - a. Based on data from previous years (WebTrends and Adobe Analytics since June), the Statistics Canada website sees between 10 and 23 million hits per month.);
  - b. Web metrics come from multiple servers and multiple domains (e.g., www.StatCan.gc.ca, www12.StatCan.gc.ca, www23.StatCan.gc.ca, www5.StatCan.gc.ca, www150.StatCan.gc.ca, www144.StatCan.gc.ca, www12.StatCan.gc.ca);



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- c. Heavy traffic sections of the site contain dynamically-generated content, which are created from databases, i.e. they consist of pages determined by various URL parameters.

#### **SW.4.2 Reporting Requirements**

To ensure that the deliverables of this contract are relevant to current business needs, and to allow the project authority to provide follow up after completion of the contract, it is essential that the project authority and contractor work collaboratively:

1. An initial meeting for general discussion about the work to be done before work commences.
2. Contractor will meet in person or by telephone with the project authority, or their delegate, for one hour every week, or more often by mutual agreement.
3. The project authority, or their delegate, will be available to review work in progress, provide details about site content, and offer other support deemed appropriate by the Project Authority, up to three total person-days per week at the start of the project and to re-evaluate with contractor once work has started.
4. Full disclosure of methods, assumptions, and limitations must be included in the written report.
  - a. The report must encompass a detailed account of:
    - i. Findings for all deliverables stated in section 4.1

The report must include:

- ii. An executive summary providing a holistic synopsis of the undertaking and findings;
- iii. A brief statement of the background, research hypothesis, objectives and tasks entailed;
- iv. A methods section;
- v. An explicit statement of assumptions and limitations with regards to both data and methods;
- vi. A results section, that interprets findings and presents them in context - this can include tables or graphics;
- vii. A recommendations section detailing action items and/or subsequent analysis;
- viii. A conclusions section.

#### **SW.4.3 Method and Source of Acceptance**

All deliverables and services rendered under any contract are subject to inspection by the Project Authority. The Project Authority shall have the right to reject any deliverables that are not considered satisfactory, or require their correction before payment will be authorized.



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## **SW.5.0 OTHER TERMS AND CONDITIONS OF THE SOW**

### **SW.5.1 Contractor's Obligations**

In addition to the obligations outlined in Section 4 of this Statement of Work, the Contractor shall:

1. document exchange and correspondence concerning the project in electronic format, via email;
2. provide draft of final documentation one week prior to completion date to allow review by the Project Authority;
3. submit all written documentation in hard copy and electronic Microsoft Office Word, PowerPoint or Excel format;
4. work onsite with the project authority at Statistics Canada office (in Ottawa, Ontario), when necessary;
5. participate in teleconferences, as needed;
6. maintain all documentation in a secure area.

### **SW.5.2 Statistics Canada Obligations**

After an initial meeting, the project authority (or their delegate(s)) shall:

1. meet in person or by telephone with the contractor to update on project status every week or more often by mutual agreement;
2. document exchange and correspondence concerning the project in electronic format, via email;
3. The project authority will review, provide comments and return draft reports or presentations within three working days;
4. The project authority will be available to review work in progress, provide details about data content, and offer other support deemed appropriate by the Project Authority, up to three total person-days per week at the start of the project and to re-evaluate with contractor once work has started.

### **SW.5.3 Location of Work, Work Site and Delivery Point**

Ongoing collaboration in person, by telephone, or electronically with the project authority members is expected.

### **SW.5.4 Language of Work**

Language of work may be in either English or French.

Working documents to be provided in English, no translation is required.

Deliverables including presentations and documents must be in English.

### **SW.5.5 Environmental considerations**

All projects should be delivered in an environmentally responsible manner, to the fullest extent possible. All non-electronic correspondence and deliverables should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content and processed chlorine free, whenever



possible. Double-sided photocopying will be the default unless otherwise specified by the Project or Contracting Authority. Photocopied documents are to be in black and white format unless otherwise specified.

The supplier will be encouraged to provide proofs for project authority review and approval either on screen or by e-mail, wherever possible. Should printed material be required, double-sided format will be the default unless otherwise specified by the Project Authority.



**ANNEX B  
BASIS OF PAYMENT**

The Contractor will be paid in accordance with the following Basis of Payment for Work performed pursuant to the Contract. All deliverables are F.O.B. Destination, and Canadian Customs Duty included, and GST/HST extra, where applicable.

<b>Milestone</b>	<b>Description</b>	<b>All-Inclusive Price</b>
1	Gather and conduct a preliminary evaluation of data source to facilitate segmentation.	\$
2	Draft report presenting of findings	\$
3	Final report of the results	\$
<b>Total Price</b>		\$



## ANNEX C CLAIM FOR PROGRESS PAYMENT

<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html>



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

### Claim for Progress Payment Demande de paiement progressif

*If necessary, use form PWGSC-TPSGC 1112 to record detail costs  
Si nécessaire, utiliser le formulaire PWGSC-TPSGC 1112 pour inscrire les coûts détaillés*

Contractor's Name and Address Nom et adresse de l'entrepreneur	Claim No. N° de la demande	Date YYYY-MM-DD / AAAA-MM-JJ	Contract Price - Prix contractuel
File No. - N° du dossier		Contract Serial No. N° de série du contrat	
Contractor's Procurement Business Number (PBN) Numéro d'entreprise-approvisionnement (NEA) de l'entrepreneur		Financial Code(s) - Code(s) financier(s)	

Contractor's Report of Work Progress (if needed, use additional sheets)  
Compte rendu de l'avancement des travaux par l'entrepreneur (si nécessaire, utiliser des feuilles supplémentaires)

Period of work covered by the claim Période des travaux visée par la demande ▶	Current Claim Demande courante		Previous Claims Demandes précédentes		Total to Date Total à date (A + B)
	(A)	Tax Rate Taux de taxe	(B)	Tax Rate Taux de taxe	
Description: (Expenditures must be claimed in accordance with the basis and/or method of payment of the contract) Description: (Les dépenses doivent être réclamées conformément à la base de paiement et (ou) à la méthode de paiement du contrat).		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
		%		%	
Contractor's GST No. N° de TPS de l'entrepreneur	Subtotal Sous-total				
Contractor's GST No. No. de TVQ de l'entrepreneur	Applicable taxes Taxes applicables				
Total					
Less holdbacks on expenditures only (Applicable taxes excluded) Moins les retenues sur les dépenses uniquement (Taxes applicables en sus)					
Total Amount of Claim (including applicable taxes) Montant total de la demande (incluant les taxes applicables)					
Percentage of the work completed Pourcentage des travaux achevés	%	Current Claim Demande courante	Amount due Montant dû		





Claim No.  
N° de la demande

Contract Serial No.  
N° de série du contrat

**CERTIFICATE OF CONTRACTOR**

**ATTESTATION DE L'ENTREPRENEUR**

I certify that:

- All authorizations required under the contract have been obtained. The claim is consistent with the progress of the work and is in accordance with the contract.
- Indirect costs have been paid for or accrued in the accounts.
- Direct materials and the subcontracted work have been received, accepted and either paid for or accrued in the accounts following receipt of invoice from supplier/subcontractor, and have been or will be used exclusively for the purpose of the contract.
- All direct labour costs have been paid for or accrued in the accounts and all such costs were incurred exclusively for the purpose of the contract;
- All other direct costs have been paid for or accrued in the accounts following receipt of applicable invoice or expense voucher and all such costs were incurred exclusively for the purpose of the contract; and
- No liens, encumbrances, charges or other claims exist against the work except those which may arise by operation of law such as a lien in the nature of an unpaid contractor's lien and in respect of which a progress payment and/or advance payment has been or will be made by Canada.

J'atteste que :

- Toutes les autorisations exigées en vertu du contrat ont été obtenues. La demande correspond à l'avancement des travaux et est conforme au contrat.
- Les coûts indirects ont été réglés ou portés aux livres.
- Les matières directes et les travaux de sous-traitance ont été reçus, et le tout a été accepté et payé, ou encore porté aux livres après réception de factures envoyées par le fournisseur ou le sous-traitant; ces matières et ces travaux ont été ou seront utilisés exclusivement aux fins du contrat.
- Tous les coûts de la main-d'œuvre directe ont été réglés ou portés aux livres et tous ces coûts ont été engagés exclusivement aux fins du contrat.
- Tous les autres coûts indirects ont été réglés ou portés aux livres après réception des factures ou pièces justificatives pertinentes et tous ces coûts ont été engagés exclusivement aux fins du contrat.
- Il n'existe aucun privilège ni demande ou imputation à l'égard de ces travaux sauf ceux qui pourraient survenir par effet de la loi, notamment le privilège d'un entrepreneur non payé à l'égard duquel un paiement progressif et/ou un paiement anticipé a été ou sera effectué par le Canada.

Contractor's Signature - Signature de l'entrepreneur

Title - Titre

Date (YYYY-MM-DD / AAAA-MM-JJ)

Check the box if the claim is being made with respect to advance payment provisions included in the basis of payment of the contract.

Cocher la case si la demande est faite en rapport avec les dispositions relatives aux paiements anticipés qui se trouvent dans la base de paiement du contrat.

This claim, or a portion of this claim, is for an advance payment.

Cette demande, ou une partie de cette demande, est pour un paiement anticipé.

I certify that:

J'atteste que :

- The funds received will be used solely for the purpose of the contract and attached is a complete description of the purpose to which the advance payment will be applied.
- The amount of the payment is established in accordance with the conditions of the contract.
- The contractor is not in default of its obligations under the contract.
- The payment is related to an identifiable part of the contractual work.

- Les fonds reçus ne serviront uniquement qu'aux fins du contrat; ci-joint est une description complète des fins auxquelles le paiement anticipé sera utilisé.
- Le montant du paiement est établi conformément aux conditions du contrat.
- L'entrepreneur n'a pas manqué à ses obligations en vertu du contrat.
- Le paiement porte sur une partie identifiable des travaux précisés dans le contrat.

Contractor's Signature - Signature de l'entrepreneur

Title - Titre

Date (YYYY-MM-DD / AAAA-MM-JJ)

**CERTIFICATES OF DEPARTMENTAL REPRESENTATIVES**  
Scientific/Project/Inspection Authority: I certify that the work meets the quality standards required under the contract, and its progress is in accordance with the conditions of the contract.

**ATTESTATIONS DES REPRÉSENTANTS DU MINISTÈRE**  
Autorité scientifique ou responsable du projet / de l'inspection : J'atteste que les travaux sont conformes aux normes de qualité exigées en vertu du contrat et que leur avancement est conforme aux conditions du contrat.

Inspection Authority (all other contracts): I certify that the quality of the work performed is in accordance with the standards required under the contract.

Responsable de l'inspection (tous les autres contrats) : J'atteste que la qualité des travaux exécutés est conforme aux normes exigées en vertu du contrat.

Signature of Scientific / Project / Inspection Authority  
Signature de l'autorité scientifique ou responsable du projet / de l'inspection

Date (YYYY-MM-DD / AAAA-MM-JJ)

**PWGSC Contracting Authority:** I certify that, to the best of my knowledge, the claim is consistent with the progress of the work and is in accordance with the contract. This claim, however, may be subject to further verification and any necessary adjustment before final settlement.

**Autorité contractante de TPSGC :** J'atteste, au meilleur de ma connaissance, que la demande correspond à l'avancement des travaux et est conforme au contrat. Toutefois, cette demande pourrait faire l'objet d'une autre vérification et de tout rajustement nécessaire avant le règlement final.

Contracting Authority Signature de l'autorité contractante

Title - Titre

Date (YYYY-MM-DD / AAAA-MM-JJ)

**Client's Authorized Signing Officer - (must sign the interim claim):** I certify that the claim is in accordance with the contract.

**Signataire autorisé du client - (doit signer la demande provisoire) :** J'atteste que la demande est conforme au contrat.

Client Signature du client

Title - Titre

Date (YYYY-MM-DD / AAAA-MM-JJ)

**Client's Authorized Signing Officer - (must sign the final claim):** I certify that all goods have been received and all services have been rendered, that the work has been properly performed and that the claim is in accordance with the contract.

**Signataire autorisé du client - (doit signer la demande finale) :** J'atteste que tous les biens ont été reçus, que tous les services ont été rendus, que tous les travaux ont été exécutés convenablement, et que la demande est conforme au contrat.

Client Signature du client

Title - Titre

Date (YYYY-MM-DD / AAAA-MM-JJ)



## **ANNEX D to PART 3 OF THE BID SOLICITATION**

### **ELECTRONIC PAYMENT INSTRUMENTS**

The Bidder accepts any of the following Electronic Payment Instrument(s):

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI).