



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

*Bid Receiving Public Works and Government  
Services Canada/Réception des soumissions  
Travaux publics et Services gouvernementaux  
Canada*

11 Laurier St. / 11, rue Laurier  
Place du Portage, Phase III  
0B2-103  
Gatineau, Québec K1A 0S5  
Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL /  
DEMANDE DE SOUMISSION**

Proposal To: Public Works and Government  
Services Canada

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

Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada

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

**Comments - Commentaires**

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

**Vendor / Firm Name and Address  
Raison sociale et adresse du  
Fournisseur /de l'entrepreneur**

**Issuing Office - Bureau de distribution**  
Division des sciences de la défense / Defence  
Sciences Division  
4<sup>e</sup> étage / 4th Floor  
Les Terrasses de la Chaudière  
10, rue Wellington /10 Wellington St. Gatineau,  
Québec K1A 0S5

<b>Title-Sujet</b> Military Personnel Research and Analysis	
<b>Solicitation No. - No de l'invitation</b> W7714-176423/A	<b>Date</b> 2018-12-12
<b>Client Reference No. - N° de référence du client</b> W7714-176423	
<b>GETS Reference No.</b> PW-18-00842954	
<b>File No. - N° de dossier</b> W7714-176423	<b>Amendment No. / Modification no.</b> 001
<b>Solicitation Closes - L'invitation prend fin</b>  at - à 14:00 on - le 2019-01-08	
<b>Time Zone / Fuseau horaire</b> Eastern Standard Time (EST) / Heure normale de l'est (HNE)	
<b>F.O.B. - F.A.B</b>  Plant-Usine : <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Etienne Sevigny	<b>Buyer Id - Id de l'acheteur</b> 003SL
<b>Telephone No. - N° de téléphone</b> 819-639-3074	<b>FAX No. - N° de FAX</b>
<b>Destination of Goods, Services and Construction: Destinations des biens, services et construction :</b>  Specified Herein Précisé aux présentes	

**Instructions : See Herein**

**Instructions : voir aux présentes**

<b>Delivery Required - Livraison exigée</b> See Herein - voir aux présentes	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur</b>	
<b>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)</b>	
<b>Signature</b>	<b>Date</b>

N° de l'invitation - Solicitation No.  
W7714-176423/A  
N° de réf. du client - Client Ref. No.  
W7714-176423/

N° de la modif - Amd. No.  
003s1  
File No. - N° du dossier  
003s1. W7714-176423/A

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

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## REQUEST FOR PROPOSAL (RFP) - SUMMARY OF CHANGES

In this document, changes to the original RFP resulting from formal solicitation amendments are indicated in **red text**.

**Dated 22 November 2018:**

Publication of the original version of the RFP on BuyandSell.gc.ca website

**Dated 12 December 2018:**

Publication of the amendment 001 of the RFP to clarify the number of CV needed for M3 and M4.

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## **PART 1 - GENERAL INFORMATION**

### **1.0 Introduction**

The bid solicitation document 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 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirement and Check List, and the Task Authorization form.

### **2.0 Summary**

The Director General Military Personnel Research and Analysis (DGMPRA) provides an integrated personnel research program to the Canadian Armed Forces (CAF) and Department of National Defence (DND). DGMPRA delivers expert, timely, and objective scientific advice that enables evidence-based strategic and operational decision-making, which includes the development of human resource policies and programs impacting all of the CAF/DND.

The work performed by DGMPRA scientists involves a variety of social science methodologies, including qualitative techniques (e.g. interviews, focus groups, foresight, benchmarking, best practices) and quantitative techniques (e.g. survey development, item design and validation, selection test development and administration, job analysis, advanced statistical analysis). DGMPRA also maintains a workforce analysis capability and employs a variety of operational research and analysis methodologies (e.g. data mining, geographic information systems, discrete event modelling and simulation).

The Contractor must provide a range of Social Sciences Research and Analysis, including services in the areas of personnel generation, personnel and family support, individual, organizational, and operational effectiveness, as well as research integration and outlook.

This bid solicitation is intended to result in the issuance of a contract for three (3) years, plus two (2) one (1) year irrevocable options allowing Canada to extend the term of the Contract.

### **3.0 Security Requirements**

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

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Security, Financial and Other Requirements;
- (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 6 - Security, Financial and Other Requirements;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;

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

### **4.0 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.

### **5.0 Trade Agreements and Canadian Content**

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), the Canadian Free Trade Agreement (CFTA), Canada – Chile Free Trade Agreement (CCFTA), Canada – Colombia Free Trade Agreement, Canada – Honduras Free Trade Agreement, Canada – Korea Free Trade Agreement, Canada – Panama Free Trade Agreement and Canada – Peru Free Trade Agreement (CPFTA), and Canada – Ukraine Free Trade Agreement (CUFTA).

**This Requirement is conditionally limited to Canadian goods, Canadian services or both. Please refer to Part 5, Certifications for more detail about the Canadian Content Certification.**

### **6.0 Communications**

As a courtesy and in order to coordinate any public announcements pertaining to this contract, the Government of Canada requests that successful Bidders notify the Contracting Authority 5 days in advance of their intention to make public an announcement related to the recommendation of a contract award, or any information related to the contract. The Government of Canada retains the right to make primary contract announcements.

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W7714-176423/A

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003sl

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003sl. W7714-176423/A

Id de l'acheteur - Buyer ID

N° CCC / CCC No./ N° VME - FMS

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## **7.0 Conflict of Interest**

The Work described herein and the deliverable items under any resulting Contract specifically exclude the development of any statement of work/requirements, evaluation criteria or any document related to a bid solicitation. The Contractor, its subcontractor(s) or any of their agent(s) directly or indirectly involved in the performance of the Work and/or in the production of the deliverables under any resulting Contract will not be precluded from bidding on any potential future bid solicitation related to the production or exploitation of any concept or prototype developed or delivered under any resulting Contract.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

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

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

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

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

Delete: 60 days  
Insert: 90 days

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

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

### 2.2 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.

### **2.3 Enquiries - Bid Solicitation**

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

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

### **2.4 Applicable Laws**

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

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

### **2.5 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 favor a particular Bidder will be given consideration provided they are submitted to the Contracting Authority at least fifteen (15) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions, and also to extend the solicitation period.



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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

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

- Section I: Technical Bid – One (1) hard copies and one (1) soft copy on a CD-ROM or DVD-ROM
- Section II: Financial Bid - One (1) hard copy and one (1) soft copy on a CD-ROM
- Section III: Certifications - One (1) hard copy and one (1) soft copy on a CD-ROM

For your information, all soft copies can be submitted on the same media. If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

### 3.2 Bid Preparation Format

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

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

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

#### Section I: Technical Bid

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements.

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## Section II: Financial Bid

Bidders must submit their financial bid in accordance with the following:

- (a) A Firm All-Inclusive Hourly Rate (FAIHR) excluding profit, for each resource category, for the Contract Period and Optional Years identified in Attachment 1 of Part 3, below. The total amount of Applicable Taxes are to be shown separately, if applicable.

**Important note to Bidders:** The rates submitted below for a given resource category must not increase by more than 5% from one period to the next. If the increase is more than 5%, the bid will be considered non-responsive.

**Note regarding SOW section 6.3 Other SMEs and subcontract:** The above Firm All-Inclusive Hourly Rate (FAIHR) will be applicable for Other SMEs and/or subcontract. The SME's level of expertise will be based on the required resource category (Senior, Intermediate, Junior) that will be defined in the Task Authorization and billed according to the rate identified in Table 1.1.

The information should be provided in accordance with the Financial Bid Presentation Sheet at Attachment 1 to PART 3 - BID PREPARATION INSTRUCTIONS.

No travel and living expenses will be paid for services provided within the National Capital Region (NCR). Further, Canada will not accept any travel and living expenses for travel between the contractor's place of business and the NCR. All of these costs are to be included in the firm all-inclusive labour rates.

- (b) For Canadian-based bidders, prices must be in Canadian funds, Applicable Taxes excluded, and Canadian customs duties and excise taxes included.

For foreign-based bidders, prices must be in Canadian funds, Applicable Taxes and Canadian customs duties and excise taxes excluded. Canadian customs duties and excise taxes payable by Canada will be added, for evaluation purposes only, to the rates and prices submitted by foreign-based bidders.

For the purpose of the bid solicitation, bidders with an address in Canada are considered Canadian-based bidders and bidders with an address outside of Canada are considered foreign-based bidders.

## Section III: Certifications

Bidders must submit the certifications required under Part 5.

### 3.3 Exchange Rate Fluctuation

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.

### ATTACHMENT 1 OF PART 3 FINANCIAL BID PRESENTATION SHEET

Bidders must provide their financial information in accordance with the following:

**1.0 For the Work identified at Annex “A”, Statement of Work, to a Limitation of expenditure:**

**1.1 Labour Rates** at a Firm All-Inclusive Hourly Rate (FAIHR), excluding profit:

Resource Category	Estimated Level of effort (h) per year (A)	FAIHR Contract Period 1 April 2018 to 31 March 2021 (B)	FAIHR Option Year 1 1 April 2021 to 31 March 2022 (C)	FAIHR Option Year 2 1 April 2022 to 31 March 2023 (D)	Extended Price (A*B + A*C + A*D)
Senior Social Sciences Research and Analysis Professional	225	\$ _____	\$ _____	\$ _____	\$ _____
Intermediate Social Science Research and Analysis Professional	900	\$ _____	\$ _____	\$ _____	\$ _____
Junior Social Sciences Research and Analysis Professional	3375	\$ _____	\$ _____	\$ _____	\$ _____
Administrative Support Assistant	150	\$ _____	\$ _____	\$ _____	\$ _____
<b>Bid Price – Labour (addition of all extended prices):</b>					\$ _____

**Important note to Bidders:** The rates submitted above for a given resource category must not increase by more than 5% from one period to the next. If the increase is more than 5%, the bid will be considered non-responsive. **Also, the rate must not include profit. The profit must be indicated below.**

\* As the meaning of “Markup” can vary from one person to another, please note the following: All administrative fees, overhead (when applicable), fringe benefits or any other operating costs to be incurred by a contractor during the course of the project, which is not considered as a “Profit”, must be incorporated under its associated cost element. The “Profit” must be indicated separately, as per indicated under section 1.2 below. To verify if your cost elements are considered acceptable by Canada, please consult the SACC Manual clause [1031-2](#).

**Note regarding SOW section 6.3 Other SMEs and subcontract:** The above Firm All-Inclusive Hourly Rate (FAIHR) will be applicable for Other SMEs and/or subcontract. The SME’s level of expertise will be based on the required resource category (Senior, Intermediate, Junior) that will be defined in the Task Authorization and billed according to the rate identified in Table 1.1.

**1.2 PROFIT:** at a firm rate of \_\_\_% of rates specified in 1.1 above, and elements in the Annex B\*: \_\_\_\_\_%

*\*Please note that this percentage will also be applied on the applicable items identified in the Annex B Basis of Payment, of the resulting contract.*

**TOTAL BID PRICE = (“Bid Price – Labour” + (“Bid Price – Labour” x profit %)) = \$ \_\_\_\_\_**

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

### **4.1 Evaluation Procedures**

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) The evaluation team will determine first if there are two (2) or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive bids with a valid certification remain, the evaluation will continue among those bids with a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.

#### **4.1.1 Technical Evaluation**

Except where expressly provided otherwise, the experience described in the bid must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered.

##### **4.1.1.1 Mandatory Technical Criteria**

Refer to Attachment 1 of Part 4, MANDATORY, FINANCIAL AND POINT RATED TECHNICAL CRITERIA.

##### **4.1.1.2 Point Rated Technical Criteria**

Refer to Attachment 1 of Part 4, MANDATORY, FINANCIAL AND POINT RATED TECHNICAL CRITERIA.

#### **4.1.2 Financial Evaluation and Evaluation of Price**

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, Canadian customs duties and excise taxes included. For evaluation purposes only, the price of the bid will be determined as the Est. Labour - Contract Period only, identified in Attachment 1 of Part 3, above.

#### **4.2 Basis of Selection - Highest Combined Rating Technical Merit and Price (70-30)**

To be declared responsive, a bid must:

- (a) Comply with all the requirements of the bid solicitation;
- (b) Meet all mandatory evaluation criteria; and,
- (c) Meet a minimum score of 45 points out of 75 points on the Point Rated Criteria;

Bids not meeting (a) or (b) or (c) will be declared non-responsive. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.

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 70%.

To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.

For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of 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 (70%) and Price (30%)</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>	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.14$	$92/135 \times 70 = 47.70$
	<b>Pricing Score</b>	$45/55 \times 30 = 24.54$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30.00$
<b>Combined Rating</b>		84.18	73.14	77.70
<b>Overall Rating</b>		1st	3rd	2nd

## 5.0 Supporting Information

If the Bidder fails to submit sufficient amount of supporting information according to the bid solicitation, excluding missing supporting information related to the Evaluation Criteria, the Contracting Authority may request it thereafter in writing, including after the closing date of the bid solicitation. It is mandatory that the Bidder provide the supporting information within three (3) business days of the written request or within such period as specified or agreed to by the Contracting Authority in the written notice to the Bidder.

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## ATTACHMENT 1 OF PART 4, MANDATORY, FINANCIAL AND POINT RATED TECHNICAL CRITERIA

### 1. Mandatory Technical Criteria (M)

At bid closing time, the Bidder must comply with the following mandatory and technical criteria and provide the necessary documentation to support compliance. Any bid which fails to meet the following mandatory technical criteria will be declared non-responsive. Each criterion should be addressed separately.

**M1** The Bidder must have a minimum of three years of experience in the last eight years in providing professional services relating to Social Sciences Research and Analysis similar in scope to the Tasks defined in Annex A, Statement of Work, Section 6.0, "Tasks". The experience must have been acquired working with organizations that are not internal to the Bidder. The Bidder must demonstrate this experience by providing a minimum of two supporting references. These references should include as a minimum:

- a) Project or contract name;
- b) Client Organization;
- c) Start Date and End Date – specify month and year (or indicate if work is still in progress);
- d) A description of the scope of the services provided; and,
- e) Name and contact information (phone number, e-mail) of an Authorized Representative who will confirm the information supplied by the bidder.

**M2** The Bidder must demonstrate a minimum of two years of experience in the last five years in the provision of services to organizations not internal to the bidder, in at least three of the four service sub-sections of the Social Sciences Research and Analysis streams as follows:

- a) Personnel Generation;
- b) Personnel and Family Support;
- c) Individual, Organizational and Operational Effectiveness; and
- d) Research Integration and Outlook.

The Bidder must support its experience by providing a minimum of three references who will confirm the information supplied by the Bidder. For each reference, the Bidder should provide supporting information as listed under M1, items (a) to (e).

**M3** The Bidder must provide three (3) résumés for each labour categories as defined in Appendix 1 of Annex A, Statement of Work, as well as the résumé of its proposed Account Manager. Each résumé must include, as a minimum, the following information:

- a. Full legal name of the proposed resource;
- b. Labour category of the proposed resource;
- c. The Canadian Industrial Security Directorate (CISD) Personnel security clearance and CISD File no. (if the proposed resource has been cleared), if not, then indicate if security clearance is in process);

- d. Education, including a list of degrees granted, name of the institution, year of graduation, any courses completed relevant to the labour category, and any applicable thesis and/or publications (refer to Appendix 1, Annex A);
- e. General work experience of the resource applicable to the resource's labour category (refer to Appendix 1 of Annex A for more information on what is considered relevant work experience). The résumé should reference the applicable position title, name of employer, start and end dates of the work period (including month and year), a description of the work performed (including whether the experience was acquired doing research, supervision, or administrative support work), the number of hours and years of experience acquired, and the name of a reference within the employing organization who can validate the information provided;
- f. Variable qualifications of the proposed resource, including any supporting information required, as listed under (d) above. (Note: for the purpose of demonstrating variable qualifications, experience less than one month in any of the areas mentioned will not be considered); and
- g. Proficiency of personnel to communicate verbally and in writing in the English language.

**M4** The Bidder's proposed resources must meet the minimum Mandatory Education and Experience Requirements of their respective labour category, as defined in Appendix 1 of Annex A, Statement of Work. Where the post-secondary degree, diploma or certificate was successfully completed and obtained outside of Canada, the Bidder has demonstrated that the other field is equivalent to the ones listed under Annex A, Statement of Work.



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## 2. Point Rated Technical Criteria (PRC)

The Technical Bid will be evaluated and scored in accordance with the following evaluation criteria:

**Total Overall Points: 75**

**Minimum required points: 45**

Criteria	Criteria Description	Maximum Points
R1	Resources Acquisition and Maintenance Plan	25 Points
R2	Subcontracting	20 Points
R3	Contract Management and Administration	15 Points
R4	Quality Assurance	15 Points

### PRC-1. Resources Acquisition and Maintenance Plan Maximum Score: 25 points

The Bidder's Resources Acquisition and Maintenance Plan (RAMP) should identify the processes and strategies which the Bidder shall employ throughout the full Contract Period, to ensure the provision of fully qualified resources in a timely manner for the performance of authorized tasks. In particular, subject to the framework of the identified labour categories specified in Appendix 1 of Annex A - Statement of Work, the Resources Acquisition and Maintenance Plan should:

- a) identify the Bidder's proposed strategy for identifying the skills, competencies, qualifications and experience that will be necessary for the performance of work under Task Authorization requests;
- b) identify the Bidder's processes, procedures and resources to work matching techniques that will ensure the provision of qualified resources for the effective and efficient performance of authorized tasks;
- c) identify the Bidder's procedures regarding mobility of resources between projects and continuity of resources on projects;
- d) identify the Bidder's strategies, proactive activities, and tools that will be employed for ensuring the timely availability of resources within each labour category in response to sporadic task authorizations throughout the Contract Period, and any Option Period, as applicable;
- e) identify the Bidder's strategy for managing planned and unplanned vacancies during the performance of authorized tasks, and limiting the impact of such vacancies;
- f) identify the Bidder's policy on disclosing the total workload picture for resources being proposed in the fulfillment of task authorization requests;
- g) identify the Bidder's policies and procedures for resource assignment dispute resolution; and
- h) Identify the Bidder's policies and procedures to ensure proficiency of its personnel in the English language.

The Bidder's Resources Acquisition and Maintenance Plan (RAMP) will be evaluated in accordance with Table A.1. In Table A.1, each column represents a subject area of evaluation. Each proposal will be awarded an evaluation rating under Column A - Risk and an evaluation rating under Column B - Heritage, based on the step values shown under each column. The evaluation rating that will be awarded under each column will be that which is considered to be the most representative of the Bidder's RAMP. The points awarded under Column A - Risk and the points awarded under Column B - Heritage will be summed and the total score will represent the Bidder's score for Table A.1:

**Table A.1**

**Resources Acquisition and Maintenance Plan (RAMP)**

Rating Column A - Risk	Rating Column B - Heritage
<p>The RAMP fully meets the requirements of Annex A - Statement of Work for the effective initiation, performance and management of authorized tasks. The RAMP presents little or no potential risk for disruption in schedule or additional cost.</p> <p>The Bidder's strategy for the identification of resource requirements, and its resource to work matching techniques demonstrates a thorough understanding of the requirements of the Appendix 1 of Annex A - Statement of Work.</p> <p>Its proactive activities and strategies for the timely availability of resources present little or no potential risk to the timely initiation, management, and close out of authorized work.</p> <p>The Bidder's proposed resource workload disclosure policies support a complete current and future availability picture for proposed resources.</p> <p style="text-align: right;"><b>Evaluation Rating: 20 Points</b></p>	<p>The Bidder has demonstrated that its proposed RAMP is based on standard proven processes which have been consistently applied by the Bidder for three years over the last eight years; and, which have been used in consistently meeting both short (&lt; 1 month) and longer term (&gt; 1 month) resource services requirements in a timely manner.</p> <p>The Bidder has demonstrated that the processes detailed in its proposed RAMP have been successfully applied in supporting a minimum of twenty projects per year which are similar in terms of technical area, value, duration, and labour categories match those identified in Appendix 1 of the Annex A - Statement of Work.</p> <p>The Bidder has demonstrated client satisfaction in the timely provision of qualified resources under the auspices of the processes detailed in its proposed RAMP.</p> <p style="text-align: right;"><b>Evaluation Rating: 5 Points</b></p>
<p>The RAMP adequately addresses the requirements of the Appendix 1 of Annex A - Statement of Work for the effective initiation, performance and management of authorized tasks. The potential for disruption in schedule or additional cost is at an acceptable level.</p> <p>The Bidder's strategy for the identification of resource requirements, and its resource to work matching techniques conveys a sufficient understanding of the requirements of the Appendix 1 of Annex A - Statement of Work.</p> <p>Its proactive activities, resource mobility policies, and strategies for the timely availability of resources present a reasonable approach to the timely initiation, management, and close out of authorized work.</p>	<p>The Bidder has demonstrated that its proposed RAMP is based on standard proven processes which have been applied by the Bidder over a period of one year or less; or which have been used in meeting only short term resource services requirements.</p> <p>The processes in the Bidder's RAMP have been applied in supporting a minimum of ten projects per year but project scope or labour categories are similar with those identified in Appendix 1 of the Annex A - Statement of Work.</p> <p>The Bidder has demonstrated client satisfaction in the timely provision of qualified resources under the auspices of the processes detailed in its proposed RAMP.</p>

**Resources Acquisition and Maintenance Plan (RAMP)**

Rating Column A - Risk	Rating Column B - Heritage
<p>The Bidder's proposed resource workload disclosure policy is adequate. <b>Evaluation Rating: 12 Points</b></p>	<p><b>Evaluation Rating: 3 Points</b></p>
<p>The RAMP contains inadequate information, or the information provided conveys that the Bidder has an insufficient appreciation of the requirements of the Appendix 1 of Annex A - Statement of Work for the effective initiation, performance and management of authorized tasks. The potential for disruption in schedule or additional cost is elevated. The Bidder's strategy for the identification of resource mobility requirements and its resources to work matching techniques is lacking information, or the information provided contains weaknesses. Its proactive activities, resource mobility policies, and strategies for the timely availability of resources present an elevated risk. Contingencies or risk reduction practices are insufficient. The Bidder's proposed resources workload disclosure policy is not clear or inadequate. <b>Evaluation Rating: 6 Points</b></p>	<p>The Bidder's RAMP is weak; or, the Bidder's RAMP does not demonstrate that its processes reflect standard company proven practice; or, the Bidder's RAMP does not demonstrate the processes detailed in the Bidder's RAMP have been consistently applied by the Bidder for resource services requirements.  The processes in the Bidder's RAMP have been applied in supporting ten or under project per year and does not adequately support the development of projects.  The Bidder has not adequately demonstrated a sufficient level of client satisfaction in the timely provision of qualified resources under the auspices of the processes detailed in its RAMP, or the extent of information provided is weak.  <b>Evaluation Rating: 0 Points</b></p>
<p>The RAMP fails to convey that the Bidder has an acceptable appreciation of the requirements of the Appendix 1 of Annex A - Statement of Work for the effective initiation, performance and management of authorized tasks. The potential for disruption in schedule or additional cost is unacceptable.  The Bidder has failed to demonstrate an acceptable strategy for the identification of resource requirements, or resources to work matching techniques.  Its proactive activities, resources mobility policies, and strategies for the timely availability of resources present an unacceptable level of risk.  The Bidder's proposed resources workload information will not be disclosed, or is not addressed.  <b>Evaluation Rating: 0 Points</b></p>	

Score Column A = \_\_\_\_\_

Score Column B = \_\_\_\_\_

**Score Column A + Score Column B = RAMP Total Score \_\_\_\_\_**

**PRC-2. Subcontracting**

**Maximum score: 20 points**

Subcontracting (for labour requirements which fall outside of the labour categories specified under Appendix 1 to Annex "A" – Statement of Work):

From time to time, tasks may arise which demand resource requirements or qualifications which fall outside the education, general experience, security or variable qualifications listed under the labour categories identified in Appendix 1 to Annex "A" - Statement of Work of the resulting contract. This would only apply where the resource requirements or qualifications for the performance of a task have been identified by the Technical Authority, and such resource requirements or qualifications are not within the education, general experience, security or variable qualifications listed under the labour categories identified in Appendix 1 to Annex "A" - Statement of Work of the resulting contract. The other areas of subject matter expertise are identified in The Statement of Work, Section 6.3 Other Subject Matter Expertise and are listed here as follows:

- a. Economics;
- b. Demography;
- c. Cultural anthropology;
- d. Clinical psychology and epidemiology;
- e. Labour force migration patterns;
- f. Research ethics;
- g. Emerging scientific methodologies and techniques;
- h. National and international networks of subject matter expertise;
- i. Research planning and administration;
- j. Scientific writing, publications and peer review.

The Bidder should identify its willingness to subcontract for such external resources, and identify its approach for doing so. To demonstrate its approach for subcontracting, the bidder should identify its sourcing, screening and evaluation tools employed to ensure qualified resources in the ten areas identified in the Statement of Work, para 6.3 Other Subject Matter Expertise, as well as identify the ability to access subcontracted resources in a timely manner.

The Bidder's approach in respect of subcontracting will be evaluated in accordance with Table A.2:

**Table A.2**  
**Subcontracting**

<b>Sourcing, Screening, and Evaluation Tools</b>
<p>The sourcing, screening, and evaluation tools which have been identified by the Bidder provide a high level of assurance that resources with additional or specific qualifications can be provided in a timely manner via subcontracting.</p> <p><b>Evaluation Rating: 20 Points</b></p>
<p>The sourcing, screening, and evaluation tools which have been identified by the Bidder provide a reasonable level of assurance that resources with additional or specific qualifications can be provided in a timely manner via subcontracting.</p> <p><b>Evaluation Rating: 10 Points</b></p>
<p>The sourcing, screening, and evaluation tools which have been identified by the Bidder may produce limited results via subcontracting, where a specific task has specified additional or specific qualifications.</p> <p><b>Evaluation Rating: 5 Points</b></p>
<p>Insufficient or no sourcing, screening, or evaluation tools have been identified or, there is no assurance that the sourcing, screening, and evaluation tools which have been identified by the Bidder will provide resources with additional or specific qualifications via subcontracting.</p> <p><b>Evaluation Rating: 0 Points</b></p>

### **PRC-3. Contract Management and Administration**

**Maximum score: 15 points**

The Bidder should identify its management processes relevant to the overall contract management, task proposal turnaround, communications and authorized work management. The proposal should identify the responsibilities and authorities of its Account Manager that will ensure effective and responsive contract management, timely preparation of acceptable task proposals, and effective management of authorized work. The proposal should identify the Bidder's approach for problem resolution, and managing lines of communication between its Account Manager, resources involved in the performance of authorized work, and the Technical and Procurement Authorities.

The Bidder's management processes relevant to the overall contract management, task proposal turnaround, and authorized work management will be evaluated in accordance with Table A.3 Contract Management. In Table A.3 Contract Management, each column represents a subject area of evaluation. Each proposal will be awarded an evaluation rating under Column A, an evaluation rating under Column B, and an evaluation rating under Column C based on the step values shown under each column. The evaluation rating that will be awarded will be that which is considered to be the most representative of the Bidder's Technical Bid for the applicable evaluation rating column. The points awarded under column A, the points awarded under column B, and the points awarded under column C will be summed and the total will represent the Bidder's score for Table A.3, Contract Management

**Table A.3**

<b>Contract Management</b>		
<b>Rating Column A Team Organization and Management Approach</b>	<b>Rating Column B Problem Resolution, Risk Identification and Mitigation</b>	<b>Rating Column C Communications, Reporting, and Access to the Work</b>
<p>The Proposal clearly demonstrates effective authorities and responsibilities of the Bidder's Account Manager, which should contribute to risk reduction.</p> <p>The Project Management approach meets requirements for effective performance, coordination, and administration of the Task Authorized Work, and of the Contract as a whole.</p> <p>The approach ensures timely identification of proposed resources and timely submission of valid proposals in response to task requests.</p> <p>The management approach presents little or no potential for disruption in schedule or cost.</p> <p style="text-align: right;"><b>Evaluation Rating: 6 Points</b></p>	<p>Problem tracking, problem resolution, and risk identification and mitigation strategies are sound and can be reasonably and successfully implemented on individual tasks, and on the contract as a whole.</p> <p>The Bidder has conveyed a thorough understanding of potential problems that may arise in the management of concurrent independent task authorizations.</p> <p style="text-align: right;"><b>Evaluation Rating: 6 Points</b></p>	<p>Clear and effective lines of communication between the Bidder's Account Manager, resources performing work under authorized tasks, and the Technical Authority have been identified.</p> <p style="text-align: right;"><b>Evaluation Rating: 3 Points</b></p>
<p>The proposal demonstrates the authorities and responsibilities of the Bidder's Account Manager, which are generally satisfactory.</p> <p>The Project Management approach meets requirements for satisfactory performance, coordination, and administration of the Task Authorized Work, and of the Contract as a whole.</p> <p>The approach for identification of proposed resources and submission of valid proposals in response to task requests is adequate.</p>	<p>Problem tracking, problem resolution, and risk identification and mitigation strategies are adequate for individual tasks.</p> <p>The Bidder's appreciation of potential problems that may arise in the management of concurrent independent task authorizations contains some weaknesses which may require additional management effort on behalf of the Technical and Procurement Authorities, or the Contracting Authority.</p>	<p>Lines of communication between the Bidder's Account Manager, resources performing work under authorized tasks, and the Technical and Procurement Authorities are generally satisfactory.</p>

<b>Evaluation Rating: 4 Points</b>	<b>Evaluation Rating: 4 Points</b>	<b>Evaluation Rating: 2 Point</b>
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<b>Contract Management (continued)</b>		
<b>Column A Team Organization and Management Approach</b>	<b>Rating Column B Problem Resolution, Risk Identification, and Risk Mitigation</b>	<b>Rating Column C Communications, Reporting, and Access to the Work</b>
<p>The proposal demonstrates that the authorities and responsibilities of the Bidder's Account Manager are limited or restricted, and which presents some risk to the effective and efficient management of the requirement; or,</p> <p>The proposal does not adequately demonstrate the authorities and responsibilities of the Bidder's Account Manager.</p> <p>The Project Management approach presents risk to the successful performance, coordination, and administration of the Task Authorized Work, and of the Contract as a whole.</p> <p>The approach for identification of proposed resources and submission of valid proposals lacks detail or is considered to present risk.</p> <p style="text-align: right;"><b>Evaluation Rating: 2 Point</b></p>	<p>Problem tracking, problem resolution, and risk identification and mitigation strategies contain some weaknesses or are not clear.</p> <p>The Bidder's appreciation of potential problems that may arise in the management of concurrent independent task authorizations is weak.</p> <p style="text-align: right;"><b>Evaluation Rating: 2 Point</b></p>	<p>Lines of communication between the Bidder's Account Manager, resources performing work under authorized tasks, and the Technical and Procurement Authorities may present risk to the project in respect of effective technical, cost, schedule or problem issues reporting.</p> <p style="text-align: right;"><b>Evaluation Rating: 1 Points</b></p>
<p>No relevant information has been provided on the authorities and responsibilities of the Bidder's Account Manager.</p> <p>Insufficient or no relevant information has been provided on the Bidder's Project Management approach.</p> <p>Insufficient or no relevant information has been provided on the Bidder's approach for identification of resources and submission of valid proposals.</p> <p style="text-align: right;"><b>Evaluation Rating: 0 Points</b></p>	<p>Insufficient or no relevant information has been provided on the Bidder's Problem tracking, problem resolution, and risk identification and mitigation strategies.</p> <p>The Bidder's appreciation of potential problems that may arise in the management of concurrent independent task authorizations has not been detailed, or insufficient information has been provided.</p> <p style="text-align: right;"><b>Evaluation Rating: 0 Points</b></p>	<p>Insufficient or no information is provided on the lines of communication between the Bidder's Account Manager, resources performing work under authorized tasks and the Technical and Procurement Authorities, which presents a high level of risk to the execution of the project.</p> <p style="text-align: right;"><b>Evaluation Rating: 0 Points</b></p>



**PRC-4. Quality Assurance:**

**Maximum Score: 15 points**

To ensure all deliverables meet the scientific requirements of each Task, including adherence to industry and Government of Canada research and publications standards as referenced in Section 5 of the Statement of Work, specifically AD2 through AD7, *“the Bidder must establish and maintain a science based quality assurance capability”*. The Bidder’s proposal should describe the Bidder’s approach that will be used to identify and ensure this level of scientific review and oversight for each individual Task Authorization. The Bidder’s approach with respect to confirming the identification of quality assurance review and oversight for each individual Task Authorization will be evaluated in accordance with Table A.4: Quality Assurance Capability.

**Table A.4**

<b>Quality Assurance Capability</b>
<b>Quality Review and Oversight Process</b>
<p>The Bidder’s proposal clearly identifies an established strategy that provides a high degree of confidence that all deliverables will undergo a process of scientific review, scrutiny and pre-inspection for conformity to industry and Government of Canada research and publication standards as referenced in the Statement of Work, Annex A, Section 5 - Applicable Documents and References. The Bidder’s proposal clearly articulates:</p> <ul style="list-style-type: none"> <li>- internal practices and procedures with respect to ensuring pro-active quality assurance reviews, scrutiny and pre-inspection;</li> <li>- that coaching and feedback that will form part of the quality assurance review process;</li> <li>- how quality assurance reviews, including feedback and guidance, will be conducted in a timely manner to meet the milestones specified in each individual Task Authorization and how the reviews will be performed for all deliverables (in both draft and final format) prior to transmission to the Technical Authority for review and acceptance;</li> <li>- how a level of consistency will be applied across the spectrum of the quality review process; and</li> <li>- the quality assurance approach will incorporate lessons learned across the resources conducting quality assurance.</li> </ul> <p style="text-align: right;"><b>Evaluation Rating: 15 Points</b></p>
<p>The Bidder’s proposal identifies an established strategy that provides an acceptable level of confidence that all deliverables will undergo a process of scientific review, scrutiny and pre-inspection for conformity to industry and Government of Canada research and publication standards as referenced in the Statement of Work, Annex A, Section 5 - Applicable Documents and References. Although the Bidder’s proposal articulates an established strategy, the strategy may lack some elements of detail, but demonstrates an acceptable level of confidence such that:</p> <ul style="list-style-type: none"> <li>- internal practices and procedures will ensure the quality of the deliverables and prevent any disruptions in meeting the milestones and timelines prescribed in each individual Task Authorization;</li> <li>- a level of consistency will be applied during the pre-inspection review process for all deliverables, both in draft and final format; and</li> <li>- initial problems that may arise will be pre-actively addressed and corrected, ensuring deliverables conform to acceptable industry and Government of Canada research and publication standards.</li> </ul> <p style="text-align: right;"><b>Evaluation Rating: 10 Points</b></p>
<p>Insufficient or no relevant information in the Bidder’s proposal to identify an established strategy to demonstrate that all deliverables will undergo a process of scientific review, scrutiny and pre-inspection for conformity to industry and Government of Canada research and publication standards as referenced in the Statement of Work, Annex A, Section 5 - Applicable Documents and References.</p> <p style="text-align: right;"><b>Evaluation Rating: 0 Point</b></p>

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default, if any certification made by the Bidder is found to be untrue, whether 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 may render the bid non-responsive or constitute a default under the Contract.

### 1. Certifications Required Precedent to Contract Award

#### 1.1 Integrity Provisions – Associated Information

By submitting a bid, the Bidder certifies that the Bidder and its Affiliates are in compliance with the provisions as stated in Section 01 Integrity Provisions - Bid of Standard Instructions 2003. The associated information required within the Integrity Provisions will assist Canada in confirming that the certifications are true.

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

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

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed [Federal Contractors Program for Employment Equity - Certification found at Attachment 1 to Part 5](#), before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

#### 1.3 Canadian Content Certification

This procurement is conditionally limited to Canadian goods and Canadian services.

Subject to the evaluation procedures contained in the bid solicitation, bidders acknowledge that only bids with a certification that the goods and services offered are Canadian goods and Canadian services, as defined in clause [A3050T](#), may be considered.

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Failure to provide this certification completed with the bid will result in the goods and services offered being treated as non-Canadian goods and non-Canadian services.

The Bidder certifies that:

( ) a minimum of 80 percent of the total bid price consist of Canadian goods and Canadian services as defined in paragraph 5 of clause [A3050T](#).

For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult Annex 3.6.(9), Example 2, of the [Supply Manual](#).

1.3.1 SACC Manual clause A3050T (2010-01-11), Canadian Content Definition

#### **1.4 Status and Availability of Resources**

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

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

#### **1.5 Education and Experience**

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

#### **1.6 Language Capability**

The Bidder certifies that it has the language capability required to perform the Work, as stipulated in the Statement of Work.

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

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## ATTACHMENT 1 TO PART 5 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

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

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\)-Labour's](#) website.

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

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 employees (combined work force includes: permanent full-time, permanent part-time and temporary employees [temporary employees only includes those who have worked 12 weeks or more during a calendar year and who are not full-time students]).

A5. The Bidder has a combined workforce in Canada of 100 or more employees; and

- A5.1 The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

**OR**

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

B. Check only one of the following:

- B1. The Bidder is not a Joint Venture.

**OR**

- B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **1.0 Security Requirement**

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

- (a) The Bidder must meet all security requirements as indicated in Part 7 - Resulting Contract Clauses, Article 3.0, Security Requirements;
- (b) The Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;

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

1.3 For additional information on security requirements, bidders should consult the "Security Requirements for PWGSC Bid Solicitations - Instructions for Bidders" (<http://www.tpsgc-pwgsc.gc.ca/app-acq/lc-pl/lc-pl-eng.html#a31>) document on the Departmental Standard Procurement Documents website.

### **2.0 Financial Capability**

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

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## PART 7 - RESULTING CONTRACT CLAUSES

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

### 1.0 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A" and the Contractor's technical bid dated \_\_\_\_\_.

### 1.1 Task Authorization

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

#### 1.1.1 Task Authorization Process

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

#### 1.1.2 Task Authorization Limit

The Technical Authority may authorize individual task authorizations up to a limit of \$150,000.00, Applicable Taxes included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

#### 1.1.3 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,

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

*"Minimum Contract Value"* means 10%.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to

stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

#### **1.1.4 Periodic Usage Reports - Contracts with Task Authorizations**

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on June 1<sup>st</sup> of each year of the Contract period to the Contracting Authority.

#### **1.1.5 Reporting Requirement Details**

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

##### **For each authorized task:**

- the authorized task number or task revision number(s);
- a title or a brief description of each authorized task;
- the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- the start and completion date for each authorized task; and
- the active status of each authorized task, as applicable.

##### **For all authorized tasks:**

- the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the Contractor for all authorized TAs; and
- the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

## **2.0 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>) issued by Public Works and Government Services Canada.

## **2.1 General Conditions**

2040 (2018-06-21), General Conditions - Research & Development, apply to and form part of the Contract.

## **2.2 Supplemental General Conditions**

Where appropriate and applicable, the work under the contract should be undertaken in accordance with the following:

- a) Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans;

## **2.3 SACC Manual Clauses**

K3410C (2015-02-25), Canada to Own Intellectual Property Rights in Foreground Information

## **3.0 Security Requirement**

**3.1** The following security requirement (SRCL and related clauses) applies and form part of the Contract:

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



#### **4.0 Term of Contract**

##### **4.1 Period of Contract**

The period of the contract is from date of contract award to March 31, 2022.

##### **4.2 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional periods of up to 12 months each 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 15 calendar days prior to the Contract expiry date. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

#### **5.0 Authorities**

##### **5.1 Contracting Authority**

The Contracting Authority for the Contract is:

**Etienne Sevigny**  
Supply Team Leader  
Public Works and Government Services Canada  
Les Terrasses de la Chaudière  
10, rue Wellington, 4e étage  
Gatineau, Quebec  
K1A 0S5

Telephone: 819-639-3074  
E-mail address: [etienne.sevigny@tpsgc-pwgsc.gc.ca](mailto:etienne.sevigny@tpsgc-pwgsc.gc.ca)

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

##### **5.2 DND Technical Authority**

The Technical Authority for the Contract is:

*(To be inserted at contract award)*

The Technical 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 Technical Authority; however, the Technical 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.

### **5.3 Contractor's Representative**

*(To be inserted at contract award)*

### **6.0 Proactive Disclosure of Contracts with Former Public Servants, as applicable**

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

### **7.0 Payment**

#### **7.1 Basis of Payment**

##### **7.1.1 TASK AUTHORIZATION**

One of the following types of basis of payment will form part of the approved Task Authorization (TA):

(a) Firm Unit Price(s) or Firm Lot Price TA

In consideration of the Contractor satisfactorily completing all of its obligations under the authorized Task Authorization (TA), the Contractor will be paid the firm lot price or the firm unit price(s), in accordance with the basis of payment, in Annex "B", as specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

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

(b) Ceiling Price TA

The Contractor will be reimbursed its costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex "B", to the ceiling price specified in the approved TA. Customs duties are included and Applicable Taxes are extra.

The ceiling price is subject to downward adjustment so as not to exceed the actual costs reasonably incurred in the performance of the Work and computed in accordance with the Basis of Payment.

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

(c) TA subject to a Limitation of Expenditure

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

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

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

## 7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$\_\_\_\_\_ (the amount inserted at contract award or at a later date). Customs duties are included and Applicable Taxes are extra.

No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- i. when it is 75 percent committed, or
- ii. four (4) months before the contract expiry date, or
- iii. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,

whichever comes first.

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.

## 7.3 Method of Payment

### 7.3.1 One of the following Method of Payment will be used for the Work, as and when applicable:

#### 7.3.1.1 Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

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

#### 7.3.1.2 Milestone Payments

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

- (a) an accurate and complete claim for payment using form PWGSC-TPSGC 1111 (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/1111.pdf>), Claim for Progress

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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.

#### **7.3.1.3 Progress Payments**

Canada will make progress payments in accordance with the payment provisions of the Contract, no more than once a month, for cost incurred in the performance of the Work up to 90 percent of the amount claimed and approved by Canada if:

- (i) an accurate and complete claim for payment using form PWGSC-TPSGC 1111(<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/1111.pdf>), 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;
- (ii) the amount claimed is in accordance with the Basis of payment;
- (iii) the total amount for all progress payments paid by Canada does not exceed 90 percent of the total amount to be paid under the Contract;
- (iv) all certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives.

The balance of the amount payable will be paid in accordance with the payment provisions of the Contract upon completion and delivery of all work required under the Contract, if the Work has been accepted by Canada and a final claim for the payment is submitted.

Progress payments are interim payments only. Canada may conduct a government audit and interim time and cost verifications and reserves the right to make adjustments to the Contract from time to time during the performance of the Work. Any overpayment resulting from progress payments or otherwise must be refunded promptly to Canada.

#### **7.4 SACC Manual Clauses**

A9117C (2007-11-30), T1204 - Direct Request by Customer Department

C0305C (2014-06-26), Cost Submission

#### **7.5 Time Verification**

SACC Manual Clause C0711C (2008-05-12), Time Verification

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## 8.0 Invoicing Instructions

### 8.1 Progress Claim

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

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 Task Authorization (TA) number;
- (d) the description of the milestone invoiced, as applicable.

For TAs subject to a Limitation of Expenditure or a Ceiling Price, each invoice must be supported by:

- (a) a list of all expenses, in accordance with the TA;
- (b) a copy of time sheets to support the time claimed;
- (c) a copy of the release document and any other documents as specified in the Contract;
- (d) a copy of the invoices, receipts, vouchers for all direct expenses, travel and living expenses;
- (e) a copy of the monthly progress report.

Applicable Taxes must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments. Holdback is not applicable to Milestone Payment.

The Contractor must prepare and certify an original claim on Form PWGSC-TPSGC 1111, and forward it to the Contracting Authority for certification in an electronic format to the electronic mail address identified under section entitled "Authorities" of the Contract. Portable Document Format (.pdf) is acceptable. The Contracting Authority will then forward the certified claim, in an electronic format, to the Technical Authority for appropriate certification after inspection and acceptance of the Work takes place, and onward submission to the Payment Office for the remaining certification and payment.

The Contractor must not submit claims until all work identified in this claim is completed.

## 9.0 Certifications

### 9.1 Compliance

Compliance with the certifications and related documentation provided by the Contractor in its bid 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, provide the related documentation or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

### 9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

### 9.3 SACC Manual Clauses

A3060C (2008-05-12), Canadian Content Certification

## 10.0 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in \_\_\_\_\_ (to be inserted at contract award).

## 11.0 Priority of Documents

If there is a discrepancy between the wordings 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 2040 (2018-06-21), General Conditions - Research & Development
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (f) Annex D, Task Authorization – DND 626
- (g) the Contractor's bid dated \_\_\_\_\_.

## 12.0 Foreign Nationals (Canadian Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) Foreign Nationals (Canadian Contractor)

**OR**

SACC Manual clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

N° de l'invitation - Solicitation No.  
W7714-176423/A  
N° de réf. du client - Client Ref. No.  
W7714-176423/

N° de la modif - Amd. No.  
003sl  
File No. - N° du dossier  
003sl. W7714-176423/A

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

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### **13.0 Insurance**

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

### **14.0 Defence Contract**

SACC Manual Clause A9006C (2012-07-16), Defence Contract

### **15.0 Site Regulations**

The Contractor must comply with all standing orders or other regulations, instructions and directives in force on the site where the Work is performed.

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## **ANNEX A STATEMENT OF WORK**

### **1. TITLE**

Military Personnel Research and Analysis in Support of Director General Military Personnel Research and Analysis

### **2. SCOPE OF CONTRACT**

The objective of this Task Authorization Contract (TAC) is to provide services to DGMPRA in the following streams:

- (a) Social Sciences Research and Analysis Services;
- (b) Administrative Support Services; and
- (c) Other Subject Matter Expertise.

### **3. BACKGROUND**

The Director General Military Personnel Research and Analysis (DGMPRA) provides an integrated personnel research program to the Canadian Armed Forces (CAF) and Department of National Defence (DND). DGMPRA delivers expert, timely, and objective scientific advice that enables evidence-based strategic and operational decision-making, which includes the development of human resource policies and programs impacting all of the CAF/DND. DGMPRA research and analysis projects are mainly concerned with the domains of personnel generation, personnel and family support, and individual, organizational, and operational effectiveness, including research integration and outlook in these domains.

The work performed by DGMPRA scientists involves a variety of social science methodologies, including qualitative techniques (e.g. interviews, focus groups, foresight, benchmarking, best practices) and quantitative techniques (e.g. survey development, item design and validation, selection test development and administration, job analysis, advanced statistical analysis). DGMPRA also maintains a workforce analysis capability and employs a variety of operational research and analysis methodologies (e.g. data mining, geographic information systems, discrete event modelling and simulation).

Historically, the vast majority of DGMPRA research and analysis was conducted by in-house scientists. Over the past decade, however, an increasing demand for evidence in support of decision-making across all levels of the CAF/DND, coupled with a mandate to leverage the external scientific community wherever possible, has led DGMPRA to supplement its capability and capacity with external research support. This support includes contracted services which contribute to all of DGMPRA's research domains, and form an integral part of DGMPRA's delivery model.



#### **4. ACRONYMS**

CAF	Canadian Armed Forces
DGMPRA	Director General Military Personnel Research and Analysis
DND	Department of National Defence
DRDC	Defence Research and Development Canada
GSM	Government Supplied Materiel
GFE	Government Furnished Equipment
HR	Human Resources
IP	Intellectual Property
NCR	National Capital Region
SME	Subject Matter Expertise
SOW	Statement of Work

#### **5. APPLICABLE DOCUMENTS & REFERENCES**

AD1	Treasury Board Directive on Travel, Hospitality, Conference and Event Expenditures
AD2	Federal Government terminology and linguistic databank "Termium Plus"
AD3	Defence Terminology Bank "Defence Terminology Manual, Manual of Abbreviations"
AD4	DRDC Publication Manual
AD5	The Canadian Style: A Guide to Writing and Editing
AD6	Publication Manual of the American Psychological Association
AD7	The Chicago Manual of Style, 16th ed.

#### **6. TASKS**

##### **6.1 General Tasks – Social Sciences Research and Analysis Services**

The Contractor must provide a range of Social Sciences Research and Analysis, including services in the areas of personnel generation, personnel and family support, individual, organizational, and operational effectiveness, as well as research integration and outlook. This may include, but is not limited to, any combination of the following:

##### **6.1.1 Personnel Generation**

- (a) Apply a variety of research methods (e.g., literature reviews, interviews, data analysis, focus groups, surveys, benchmarking, best practices) to determine strategic-level direction relevant to HR management and evidence-based HR policy development;
- (b) Perform research and analysis related to strategic and integrated HR planning, including HR concept development and conducting benchmarking studies of best practices, as well as occupational analysis;

- (c) Conduct research, development, and analysis related to personnel selection and assessment. This may involve the creation and development of selection and assessment tests and processes for in-service and entry-level recruiting. Research and development in this areas may include any of the following: job analyses using the Combined Job Analysis technique, and the development and validation of personnel assessment measures/processes (including but not limited to cognitive and non-cognitive measures, personality inventories, biodata measures, situational judgement tests, work samples, structured interviews, role plays, group exercises, in-basket exercises, and assessment centres). This may also incorporate the development of behaviourally anchored rating scales or behavioural indicators;
- (d) Conduct research in support of the development of Succession Planning/Management and Performance Appraisal systems, including assessing performance appraisal system efficacy (e.g., predictive validity), coaching, continuous performance appraisal, rating scales and promotion to executive levels;
- (e) Conduct research in support of the development and/or assessment of learning, training, and evaluations systems, processes, and policies;
- (f) Conduct research in support of attraction and recruiting including strategic level concept development and labour market availability;
- (g) Perform research and analysis related to personnel retention and attrition, including psychosocial influences affecting stay or leave decision; the development of measures to assess effectiveness of HR policies; and analysis of historical data; and
- (h) Conduct statistical and psychometric analysis of psychological test and survey data (e.g., to assess differential item functioning, adverse impact, reliability/validity, factor structure of measures), including preparation of related reports and/or presentations in the area of personnel generation.

### **6.1.2 Personnel and Family Support**

- (a) Conduct qualitative and quantitative research (e.g., literature reviews, interviews, data analysis, focus groups, surveys, benchmarking, best practices), that can be applied to all aspects of the research streams – including psychosocial health, family research and deviant and unproductive behaviour;
- (b) Conduct qualitative and quantitative research into psychosocial conditions of work related to health behaviours;
- (c) Conduct qualitative and quantitative research on family functioning and resiliency; well-being and related topics;

- (d) Conduct qualitative and quantitative research in support of personnel support and quality of life initiatives;
- (e) Conduct qualitative and quantitative research on employment equity, diversity and inclusion;
- (f) Conduct statistical and psychometric analysis of survey data and preparation of reports and presentations in the area of personnel and family support; and
- (g) Conduct qualitative and quantitative research on unproductive and deviant workplace behaviours.

### **6.1.3 Individual, Organizational, and Operational Effectiveness**

- (a) Apply a variety of research methods (e.g., literature reviews, interviews, data analysis, focus groups, surveys, benchmarking, best practices) to provide research and analysis services to support the creation, development, analysis and evaluation of personnel policies and programs in the areas of organizational leadership, organizational culture, operational and organizational effectiveness; well-being and organizational performance measurement;
- (b) Conduct research and analysis related to human dimensions of military operations to include aspects of social psychological readiness, trust, resilience, and readjustment;
- (c) Conduct research and analysis related to human dimensions climate (unit) level measures of moral psychosocial well-being, and other factors related to effectiveness of units in garrison and at sea;
- (d) Perform research and analysis related to leadership, culture and ethics;
- (e) Apply a variety of research methods (e.g., literature reviews, interviews, focus groups) to determine unit climate and strategic-level direction relevant to organizational behaviour; and
- (f) Conduct research analysis related to organizational culture, climate, ethics and identity.

### **6.1.4 Research Integration and Outlook**

- (a) Apply a variety of research and analysis methods (e.g., outlook, foresight, red-teaming, environmental scanning) to identify events, developments and trends of importance to the CAF/DND (e.g., socio-cultural, technological, economic, environmental, political, etc.), with a particular focus on applicability to the military human resource system;

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- (b) Conduct geographically based research and analysis related to CAF recruitment, attraction and marketing; and
  - (c) Generate synthesis/summary reports on new knowledge, insight, recommendations, and products (such as posters and infographics) by consolidating, integrating and synthesizing research findings from scientific products across the spectrum of the Personnel Generation, Personnel and Family Support, and Individual and Organizational Effectiveness research domains.

## **6.2 Administrative Support Services**

The Contractor must provide Administrative Support Services to support the collection, preparation, compilation and formatting of data files for analysis, and the generation of analysis products and reports. This may include, but is not limited to, any combination and extent of the following examples:

- (a) Review and 'cleaning' of survey, test data and/or databases;
- (b) Conduct coding of data for data entry;
- (c) Enter survey, test and qualitative (e.g. narrative) data from various sources and formats into an electronic computer according to pre-described format;
- (d) Assist in data collection and compilation;
- (e) Prepare survey and test materials for distribution;
- (f) Organize data according to user requirements;
- (g) Check enter data for errors and correcting as required; and
- (h) Perform note-taking in focus groups or facilitated discussions.

## **6.3. Other Subject Matter Expertise**

At the request of the Technical Authority, the Contractor may be required to provide a range of subject-matter expertise for services which fall outside of the work streams identified above. The services could include, but are not limited to, providing research and analysis services and expertise related to any of the following areas:

- (a) Economics;
- (b) Demography;
- (c) Cultural anthropology;
- (d) Clinical psychology and epidemiology;
- (e) Labour force migration patterns;
- (f) Research ethics;
- (g) Emerging scientific methodologies and techniques;
- (h) National and international networks of subject matter expertise;
- (i) Research planning and administration;
- (j) Scientific writing, publications, and peer review.

## **7. DELIVERABLES**

In accordance with the Task Authorization process, the Contractor will be required to perform specific activities on an “as and when requested” basis. The specific details, including the deliverables to be produced for each of these activities, will be elaborated in each individual Task Authorization by the Technical Authority.

### **7.1 Task Authorizations**

Upon receipt of a Statement of Work, the Contractor must provide a response to the Crown within five business days. As a minimum, the Contractor’s response must include the following information:

- (a) A technical proposal outlining the proposed approach and methodology to meet the requirements as specified in each individual Statement of Work. This must include the work schedule identified by Fiscal Year (1 April – 31 March);
- (b) A summary that indicates the Contractor’s understanding of the required Tasks to be performed as specified in the Statement of Work;
- (c) The name, number of hours for each proposed individual, including the applicable labour category, and the proposed costs for each individual. Resumes of any newly proposed individuals must have received prior approval from the Technical Authority; and
- (d) The name of the individual assigned to conduct a quality review and pre-inspection of each deliverable scheduled to be completed under each individual Task Authorization. This individual must have received prior approval from the Technical Authority; and
- (e) Indication if the Contractor will sub-contract all or a portion of the work. The Contractor must provide the name of the sub-contracted vendor the names of the sub-contracted personnel and a cost breakdown for each proposed individual. Sub-contracted personnel must have received prior approval for inclusion from the Technical Authority.

The Contractor must document activities and deliverables by task for review by Canada. For each Task Authorization issued, the Contractor must ensure all deliverables, both draft and final formats, comply with the requirements as prescribed in individual Task Authorizations.

### **7.2. Resources**

The Appendix 1 of Annex A specifies the labour categories and their mandatory education and experience requirements. Tasks may require multiple persons from one or more labour categories. The Contractor must maintain access to sufficient resources in each category to fulfill the requirements of the Contract.

### **7.3 Format**

The Contractor is required to work with Microsoft (MS) Office Suite of software applications, including MS Word, Excel, PowerPoint, and Project. Deliverables must be in electronic format,

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as designated by the Technical Authority. Unless otherwise specified in the Task Authorization, documentation must be delivered in the appropriate MS or SPSS statistical software format.

#### **7.4 Language**

The language of communications and deliverables to be submitted under authorized tasks must be in English unless otherwise specified. For the purposes of this requirement, the Contractor must ensure Contractor personnel can communicate proficiently in the English language.

#### **7.5 Quality**

The work conducted by the Contractor must be timely, comprehensive, and of a high standard such that all stakeholders comprehend the messages, themes, and intent of the communications. Oral and written communications must be presented clearly, concisely, and appropriately to support all Task Authorization requirements.

The Contractor must establish and maintain a senior science quality assurance capability to ensure all deliverables meet the scientific requirements of each Task, including adherence to industry and Government of Canada research and publication standards as referenced in Section 5, specifically AD2 through to AD7. For each individual Task, the Contractor must identify a science advisor with responsibility to pre-inspect all deliverables before transmission to the Technical Authority for review. This individual must be identified in the Task Authorization Proposal and approved by the Technical Authority.

#### **7.6 Approval**

Upon completion of a Task Authorization, all deliverables for that Task Authorization must be submitted to the Technical Authority for approval. All deliverables completed in response to the tasking will be evaluated on the basis of suitability, quality and adherence to the established schedule, as well as and the industry and Government of Canada research and publishing standards as referenced in Section 5, specifically AD2 through to AD7.

#### **7.7 Meetings**

The Contractor may be required to attend meetings specific to individual Task Authorizations issued under the Contract. If travel by the Contractor personnel is required, reimbursement of costs will be indicated within individual Task Authorizations. In the case of meetings conducted by phone, no costs will be reimbursed for Contractor personnel participation to these meetings.

All travel by Contractor personnel must be pre-authorized by DND and must adhere to the Treasury Board Directive on Travel, Hospitality, Conference and Event Expenditures, as referenced in Section 5.

## **8. CONTRACT MANAGEMENT AND ADMINISTRATION**

### **8.1 Capability**

The Contractor must establish and maintain a management capability for the operation, maintenance, oversight and overall management of the Contract. The Contractor must provide effective and efficient organization, control systems, quality assurance and reporting procedure in order to:

- (a) Manage risks and issues, including troubleshooting, resolution or clarification to any issues related to Task Authorizations or the invoicing process;
- (b) Meet performance and scheduling requirements;
- (c) Draft and submit to the Technical Authority detailed proposals (technical, management, costs) in response to task requests, as per the process described in Section 7;
- (d) Provide data, financial management and contract administration;
- (e) Provide overall portfolio management and report on the progress of the requirements of the Contract and on Tasks that have been authorized at any one time.

The Contractor must designate a *Senior Account Manager* who must act as a single point of contact between the Contractor and the Technical Authority. This individual is responsible for all matters related to contract management and administration as detailed above. For all contractual matters, Contractor resources must communicate with the Technical Authority through the appointed Senior Account Manager.

### **8.2 Reports**

#### **8.2.1 Contract Management Plan**

The Contractor must prepare and maintain a Contract Management Plan for the duration of the contract. The Contract Management Plan must include a high level overview of each task (title, date received, date approved, date completed, cost and expenditures, including overall status). The Contract Management Plan must be prepared in either MS Word or MS Excel and maintained on a real-time basis with an electronic copy included with each invoice.

#### **8.2.2 Progress Reports**

The Contractor must provide the Technical Authority with a Progress Report in electronic format (MS Word and/or MS Excel) no later than two weeks before each scheduled Progress Review Meeting. Each Progress Report must include, as a minimum, the following:

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- (a) The status of each active Task Authorization, including any challenges or pending requirements for active Tasks;
  - (b) Details on each Task Authorization that has ended since the previous review meeting;
  - (c) For each active Task Authorization, expenditures to date and forecast of expenditures for the current Fiscal Year, as well as any expenditures that will extend into the subsequent Fiscal Year;
  - (d) Identification of any problems (if any) with current timelines or deliverables of active Task Authorizations; and
  - (e) Identification of other problems encountered since the previous Progress Review Meeting (if any) and proposed solutions.

### **8.2.3 Contract Completion Report**

The Contractor must submit a Contract Completion Report in electronic format (MS Word and/or MS Excel) to the Technical Authority no later than two and one half months prior to the Final Contract Meeting. The Contract Completion Report must include the following:

- (a) Key successes, weaknesses and lessons learned with respect to the management of the Contract;
- (b) Administrative issues or challenges experienced (e.g., processing of new Task Authorizations, workflow, Contract timelines, etc.);
- (c) Financial issues (e.g., basis of payment, contract finances, overhead, etc.);
- (d) Issues related to security, confidentiality, intellectual property and publication, which may have come up when dealing with sub-contractors, as required;
- (e) Issues related to subcontract management, as required;
- (f) Perspectives on the Task Authorization process; and
- (g) Recommendations for future Research and Development research requirements.



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## 8.2.4 Final Contract Report

The Contractor must prepare and submit a Final Contract Report to address any outstanding items identified during the Final Contract Meeting and submit a Final Contract Report in electronic format (MS Word and/or MS Excel) to the Technical Authority no later than 15 calendar days before the Contract end date.

## 8.3 Meetings

Initial, progress, and final contract meetings will be held during the course of the Contract. All meetings will be conducted either in person or by teleconference, at the discretion of the Technical Authority and limited to only the relevant contractor personnel required for the specific meeting. In person meetings will be held at the offices of DGMPRA (unless otherwise mutually agreed to by the Contractor and the Technical Authority).

For the aforementioned meetings, the Contractor must:

- (a) Ensure participation of the Senior Account Manager;
- (b) Prepare and provide the Technical Authority with an agenda (electronic format) no later than two weeks prior to each meeting;
- (c) Take the minutes of the meeting and prepare a record of discussion;
- (d) Document all corrective action; and
- (e) Provide the record of discussion (electronic format) no later than two weeks after each meeting.

### 8.3.1 Initial Teleconference

Upon contract award, the Technical Authority will schedule an initial teleconference with the Contractor to discuss the details of the Contract, and review and discuss both the proposed Task plan and the Contractor's Contract Management Plan prior to implementation. This teleconference will take place within one month of Contract award.

### 8.3.2 Progress Review Meeting

Progress review meetings will take place on a semi-annual basis, typically during the months of March and November. At the request of the Technical Authority, additional PRMs may be held outside of this schedule. The objectives of these meetings are to:

- (a) Report progress focusing on adherence to the Contract Management Plan, to include the status of ongoing tasks, costs and expenditures status;
- (b) Discuss issues related to the performance of work;

(c) Anticipate future Task Authorizations to be performed under the Contract; and

(d) Discuss any other issues flagged in the Progress Report.

### **8.3.3 Final Contract Meeting**

A final contract meeting must take place no later than two months before the conclusion of the Contract, with a focus to discuss lessons learned and Contract performance over the lifetime of the Contract and to review the Contract Completion Report.

## **9. LOCATION OF WORK / TRAVEL AND LIVING**

### **9.1 Location**

Typically, services will be performed at the Contractor's own place of business; the Contractor must provide adequate work space and office equipment to ensure the uninterrupted flow of services. In some instances, however, services may be performed on-site within the National Capital Region (NCR) or at locations across Canada when field work is necessitated.

Should the Technical Authority determine that a portion of the work must be performed "on-site" at a DND facility, Canada will supply the necessary equipment as specified in the Task Authorization. This access and minor equipment, will be provided during the normal hours of operation (8:00 am to 5:00 pm Eastern Daylight Savings Time, Monday to Friday, excluding holidays) of the facility. Any requirements for access outside of these days/hours must be forwarded to the DND Technical Authority for approval.

### **9.2 Travel**

For travel required to perform services on-site at a DND facility, details (i.e. date(s), location(s), number of travelers, accommodations, mode of transportation) must be included in the costing proposal. Without exception, DND must authorize Contractor travel in advance, and all travel must adhere to the Treasury Board Directive on Travel, Hospitality, Conference and Event Expenditures. No expenses will be reimbursed for Contractor personnel travelling within the NCR.

For travel related to a Task Authorization, costs will be charged to the applicable Task Authorization. For travel related to Contract Management and Administration (e.g. Contractor personnel required to attend Progress Review Meetings and final contract review meetings with the Procurement and Technical Authority), the Contractor will be responsible for the travel and living expenses of Contractor personnel.

## **10. CONTRACTOR FURNISHED EQUIPMENT / MATERIAL**

Standard commercial off-the-shelf software, which is required to perform tasks, must be provided by the Contractor at its own expense. For all tasks, this includes the most up-to-date

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version of Microsoft Office Suite, MS Project, Adobe Acrobat, and IBM SPSS Statistical Software.

## **11. GOVERNMENT SUPPLIED MATERIAL (GSM) / GOVERNMENT FURNISHED EQUIPMENT (GFE)**

Canada may provide the Contractor with access to GSM (e.g., databases, data sets, previous research papers, software, survey and/or tests), and/or specialized GFE (e.g., military gear, helmets) tools and/or access to facilities, in relation to work conducted under a Task Authorization. This equipment may only be used by the Contractor for work directly related to each Task Authorization and must be returned to the Technical Authority upon completion of the task. Any GSM or GFE provided to the Contractor will be identified in individual Task Authorizations.

## **12. SECURITY**

A majority of the work performed under the contract is unclassified. Individual task authorizations will detail instances where access to protected information is required. In these instances, access will be identified using the government of Canada (goc) security requirements checklist. Every contracted personnel requiring access to protected information, assets or work site(s) must hold a valid enhanced reliability clearance status, granted or approved by public services and procurement Canada.

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**APPENDIX 1 OF ANNEX A  
LABOUR CATEGORIES AND  
MANDATORY EDUCATION AND EXPERIENCE REQUIREMENTS**

**GENERAL**

1. The following tables list the labour categories and the associated mandatory education and experience requirements, with the mandatory requirements divided as follows:
  - (a) Education – lists the minimum mandatory education requirement(s) for the labour category;
  - (b) General Experience – lists the mandatory minimum general experience required for the labour category;
  - (c) Variable Qualifications – lists other qualifications required for the labour category, and specifies the minimum requirement(s) that must be satisfied; and
  - (d) Security – lists the minimum and/or maximum required personnel security clearance requirements for the labour category to perform any Authorized Tasks under the Contract in accordance with the Security Requirements Checklist (SRCL).
2. Where the post-secondary degree, diploma or certificate was successfully completed and obtained outside of Canada. Canada reserves the right to request a Canadian equivalency document issued by a recognized academic credential assessment organization showing the academic level obtained.
3. Requirements are considered to be met if the level of the proposed resource is equal to or higher than the requirement.
4. Unless the context otherwise requires, the term "applicable field of education" means the following (or sub-fields thereof):

**Senior Social Sciences Research and Analysis Professional:**

- (a) Industrial Psychology;
- (b) Organizational Psychology;
- (c) Personnel Psychology;
- (d) Cognitive Psychology;
- (e) Social Psychology;
- (f) Sociology;
- (g) Management – Organizational Behaviour;
- (h) Management – Organizational Culture;
- (i) Management – Human Resources; and
- (j) Management – Strategic Management

### **Intermediate and Junior Social Science Research and Analysis Professionals:**

- (a) Industrial Psychology;
- (b) Organizational Psychology;
- (c) Personnel Psychology;
- (d) Cognitive Psychology;
- (e) Social Psychology;
- (f) Sociology;
- (g) Occupational Health Psychology;
- (h) Education Psychology;
- (i) Management – Organizational Behaviour;
- (j) Management – Organizational Culture;
- (k) Management – Human Resources; and
- (l) Management – Strategic Management

5. Unless the context otherwise specifies, the term “relevant experience”, contained in the General Experience requirements of each labour category means:

“Experience that is directly related to the labour category and which requires the use of knowledge, sound judgment, skill, and reason in the application of the identified educational qualifications of the labour category, for the successful conduct of the work being referenced by the Bidder.”

6. Unless the context otherwise specifies, one year of experience is considered equivalent to one thousand two hundred hours of relevant work experience (e.g. 1200 hours of relevant work experience acquired over a period of five years would only equal to one year of experience).
7. For the purposes of determining years of experience, no time can be calculated twice (e.g., supervisory work experience cannot also be counted as research experience).
8. For the variable qualifications, experience less than one month in any of the areas mentioned will not be considered.

<b>Labour Category</b>	<b>Senior Social Sciences Research and Analysis Professional</b>
<b>Education</b>	A Ph.D. degree in social sciences.
<b>General Experience</b>	<p>At least three years in the last ten years of relevant research experience beyond the completion of Ph.D. studies.</p> <p>At least three consecutive years of supervisory experience in the last ten years in a social sciences research and analysis setting, which may include direct supervision of graduate students in an academic setting.</p>
<b>Variable Qualifications</b>	<p>Demonstrated research experience in at least seven of the twenty areas identified below*:</p> <ul style="list-style-type: none"> <li>a. Human resources planning;</li> <li>b. Selection and assessment;</li> <li>c. Attraction and recruiting;</li> <li>d. Retention and attrition;</li> <li>e. Psychometric analysis of psychological tests;</li> <li>f. Psychometric analysis of survey data;</li> <li>g. Employment equity, diversity, and inclusion;</li> <li>h. Organizational behaviour;</li> <li>i. Organizational culture;</li> <li>j. Leadership;</li> <li>k. Ethical behaviour;</li> <li>l. Morale and cohesion;</li> <li>m. Performance measurement;</li> <li>n. Performance appraisal;</li> <li>o. Individual training and education;</li> <li>p. Psychosocial health and wellbeing;</li> <li>q. Family functioning and resiliency;</li> <li>r. Deviant and unproductive workplace behaviour;</li> <li>s. Research ethics; and</li> <li>t. Advanced statistical analysis techniques.</li> </ul> <p>* Experience less than one month in any of the areas mentioned will not be considered for the purposes of evaluation.</p>
<b>Personnel Security Clearance</b>	Minimum of Enhanced Reliability clearance.

<b>Labour Category</b>	<b>Intermediate Social Sciences Research and Analysis Professional</b>
<b>Education</b>	A Master of Arts (M.A.), Master of Sciences (M.Sc) or Master of Applied Sciences (MA.SC) degree in applicable field of education.  Must have completed a minimum of one graduate level research or experimental design course, and one graduate level multivariate statistics course.
<b>General Experience</b>	At least two years in the last ten years of relevant research experience beyond the completion of graduate studies.
<b>Variable Qualifications</b>	Demonstrated research experience in at least five of the twenty-one areas identified below*:  a. Human resources planning; b. Selection and assessment; c. Attraction and recruiting; d. Retention and attrition; e. Psychometric analysis of psychological tests; f. Psychometric analysis of survey data; g. Employment equity, diversity, and inclusion; h. Organizational behaviour; i. Organizational culture; j. Leadership; k. Ethical behaviour; l. Morale and cohesion; m. Performance measurement; n. Performance appraisal; o. Individual training and education; p. Psychosocial health and wellbeing; q. Family functioning and resiliency; r. Deviant and unproductive workplace behaviour; s. Research ethics; t. Advanced statistical analysis techniques; and u. Literature reviews in one of the areas above.  * Experience less than one month in any of the areas mentioned will not be considered for the purposes of evaluation.
<b>Personnel Security Clearance</b>	Minimum of Enhanced Reliability clearance.

<b>Labour Category</b>	<b>Junior Social Sciences Research and Analysis Professional</b>
<b>Education</b>	<p>Undergraduate degree in an applicable field of education.</p> <p>Must have completed a minimum of one (1) undergraduate level research or experimental design course and one (1) undergraduate level multivariate statistics course.</p>
<b>General Experience</b>	<p>At least two years in the last ten years of relevant research experience beyond the completion of undergraduate studies.</p> <p>For the Junior Social Sciences Research and Analysis Professional, an MA, Ma.Sc. or M.SC. degree can be substituted in lieu of the additional two years of relevant work experience beyond the undergraduate level.</p>
<b>Variable Qualifications</b>	<p>Demonstrated research experience in five of the ten areas identified below*:</p> <ul style="list-style-type: none"> <li>a. Selection and assessment;</li> <li>b. Attraction and recruiting;</li> <li>c. Retention and attrition;</li> <li>d. Psychometric analysis of psychological tests;</li> <li>e. Psychometric analysis of survey data;</li> <li>f. Occupational health psychology;</li> <li>g. Organizational behaviour;</li> <li>h. Organizational culture;</li> <li>i. Performance measurement; and</li> <li>j. Social science literature reviews in one of the areas above.</li> </ul> <p>* Experience less than one) month in any of the areas mentioned will not be considered for the purposes of evaluation.</p>
<b>Personnel Security Clearance</b>	Minimum of Enhanced Reliability clearance.



<b>Labour Category</b>	<b>Administrative Support Assistant</b>
<b>Education</b>	Completion of High School diploma.
<b>General Experience</b>	<p>Must have at least one year of experience in the past three (3) years performing administrative support services.</p> <p>Must have at least six months experience in the past three (3) years with one of the following spreadsheet applications: MS EXCEL, MS ACCESS, or SPSS.*</p> <p>* A combination of experience with these spreadsheet applications that totals at least six months of work is acceptable.</p>
<b>Variable Qualifications</b>	<p>Demonstrated experience in at least three (3) of the following seven areas*:</p> <ol style="list-style-type: none"> <li>a. Data entry;</li> <li>b. Data cleaning and validation;</li> <li>c. Coding data;</li> <li>d. Preparing and administering surveys;</li> <li>e. Assisting in data collection and compilation;</li> <li>f. Note-taking in focus groups or facilitated discussions;</li> <li>g. Providing administrative support services in social sciences research setting.</li> </ol> <p>* Experience less than one month in any of the areas mentioned will not be considered for the purposes of evaluation.</p>
<b>Personnel Security Clearance</b>	Minimum of Enhanced Reliability clearance.

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## ANNEX "B" BASIS OF PAYMENT

### 1.0 Firm all-inclusive hourly rate – Resources

*The Firm all-inclusive hourly rates table will be inserted at contract award.*

**Note regarding overtime:** After a work period of 7.5 consecutive hours, the Contractor may claim 1.5 times the firm all-inclusive hourly rate listed in the tables above for any time worked beyond the first 7.5 hours in a given day. Overtime hours cannot be claimed unless they are pre-approved by the Technical Authority.

**Note regarding SOW section 6.3 Other SMEs and subcontract:** The above Firm All-Inclusive Hourly Rate (FAIHR) will be applicable for Other SMEs and/or subcontract. The SME's level of expertise will be based on the required resource category (Senior, Intermediate and Junior) that will be defined in the Task Authorization and billed according to the rate identified in Table 1.0 above.

**2.0 OTHER DIRECT CHARGES:** at actual cost without profit **TBD in each TA\***  
(Specify what categories of direct charges, profit % in 4.0 may be applied)

### 3.0 Travel and Living Expenses, if applicable and authorized by the Technical Authority

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the work, at cost, without any allowance for profit and/or administrative overhead, in accordance with appendices B, C and D of the National Joint Council Travel Directive <http://www.njc-cnm.gc.ca/directive/d10/en>. Note that Incidental expenses are not reimbursed anymore, please consult the National Joint Council Travel Directive for more information.

**TBD in each TA\***

**4.0 PROFIT:** at a firm rate of \_\_\_% of item(s) 1.0 and 2.0 above **TBD in each TA\***

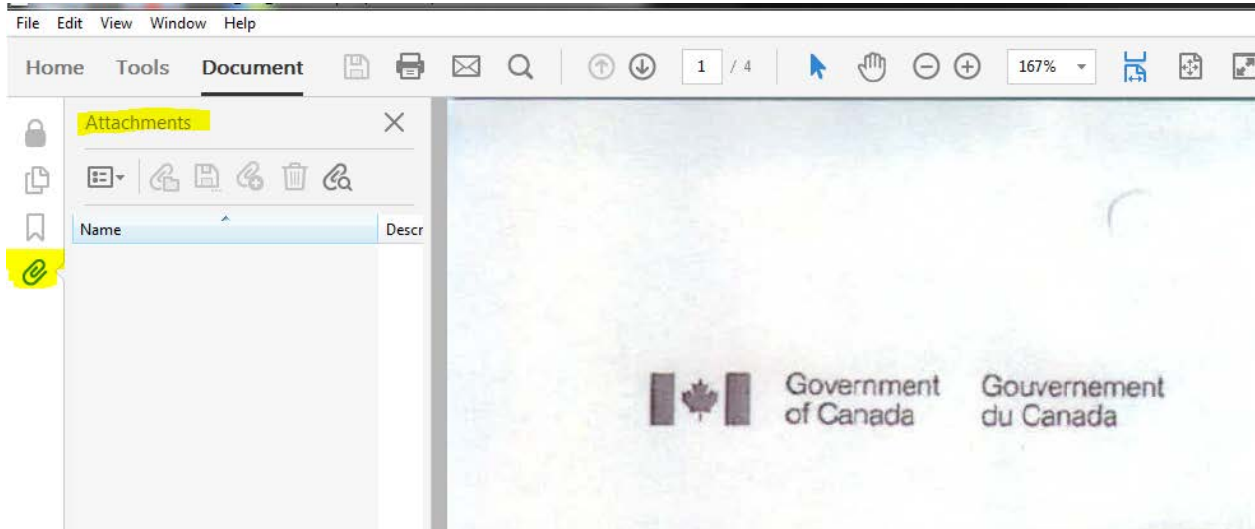
*\*Note: these amounts will be determined in the TA and must not exceed the Limitation of Expenditure.*

**Total Estimated Amount to a Limitation of Expenditure:  
Refer to Article 7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations of the  
Contract's T&Cs.**

With the exception of the firm rate(s) and firm price(s), the amounts shown in the various items specified above are estimates only. Changes to these estimates will be accepted for billing purposes as the Work proceeds, provided that these changes have the prior approval of the Technical Authority and provided that the estimated cost does not exceed the aforementioned Limitation of expenditure.

## ANNEX "C" SECURITY REQUIREMENT CHECK LIST (SRCL)

Please refer to the "Attachments" section of this PDF document.



**ANNEX "D"**  
**TASK AUTHORIZATION FORM – DND 626**

**THE ATTACHED TASK AUTHORIZATION FORM – DND 626 FORMS PART OF THE SOLICITATION DOCUMENT AND THE RESULTING CONTRACT.**

**Please refer to the "Attachments" section of this PDF document.**

