



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

**Bid Receiving - PWGSC / Réception des
soumissions - TPSGC**

11 Laurier St. / 11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Québec

K1A 0S5

Bid Fax: (819) 997-9776

**REQUEST FOR PROPOSAL
DEMANDE DE PROPOSITION**

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

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

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

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

Comments - Commentaires

Vendor/Firm Name and Address

Raison sociale et adresse du

fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution

Communication Procurement Directorate/Direction de
l'approvisionnement en communication

360 Albert St./ 360, rue Albert

12th Floor / 12ième étage

Ottawa

Ontario

K1A 0S5

Title - Sujet Quantitative Research	
Solicitation No. - N° de l'invitation 35035-182384/A	Date 2019-02-11
Client Reference No. - N° de référence du client 35035-18-2384	
GETS Reference No. - N° de référence de SEAG PW-\$\$CY-021-76428	
File No. - N° de dossier cy021.35035-182384	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-03-11	Time Zone Fuseau horaire Eastern Standard Time EST
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Amaral, Paola	Buyer Id - Id de l'acheteur cy021
Telephone No. - N° de téléphone (613) 998-8588 ()	FAX No. - N° de FAX () -
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: PRIVY COUNCIL OFFICE BLACKBURN BLDG RM 300 85 SPARKS ST OTTAWA Ontario K1A0A3 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

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35035-182384/A
Client Ref. No. - N° de réf. du client
35035-18-2384

Amd. No. - N° de la modif.
File No. - N° du dossier
cy021.35035-182384

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

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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

The Annexes are listed in the Table of Contents.

1.2 Summary

Public Works and Government Services Canada (PWGSC), on behalf of the Privy Council Office (PCO), has a requirement to conduct on-going **quantitative public opinion research data collection** to ensure up-to-date and accurate representations of Canadian opinion on various issues, notably as they relate to Government of Canada priorities.

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

The requirement is limited to Canadian services.

The Federal Contractors Program (FCP) for employment equity applies to this procurement; refer to Part 5 – Certifications and Additional Information, Part 6 - Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity - Certification.

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

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

1.3 Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

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

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

Delete: 60 days

Insert: 120 days

2.1.1 SACC Manual Clauses

SACC Manual Clause [A3050T](#) (2018-12-06) – Canadian Content Definition

SACC Manual Clause [A3015T](#) (2014-06-26) – Certification – Bid

SACC Manual Clause [A7035T](#) (2007-05-25) – List of Proposed Subcontractors

2.2 Submission of Bids

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

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

2.3 Former Public Servant

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

Definitions

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

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or

- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

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

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

2.6 Basis for Canada's Ownership of Intellectual Property

The Privy Council Office (PCO) has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#): the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

- If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. Bidders must provide their bid in a single transmission. The epost Connect service has the capacity to receive multiple documents, up to 1GB per individual attachment.

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

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

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

Section I: Technical Bid (four (4) hard copies and one (1) soft copy on a USB key)
Section II: Financial Bid (two (2) hard copies and one (1) soft copy on a USB key)
Section III: Certifications (two (2) hard copies and one (1) soft copy on a USB key)
Section IV: Additional Information (one (1) hard copy and one (1) soft copy on a USB key)

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

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

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

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

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

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

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

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

Section I: Technical Bid

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

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

Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B".

3.1.2 Electronic Payment of Invoices – Bid

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

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

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

Section III: Certifications

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

3.2 Bid Submission Form

In addition, Bidders are requested to complete and submit the forms found in Annex "H" RFP Submission Form / Subcontractor Information.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Phased Bid Compliance Process

4.1.1.1 General

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

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

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

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2018-05-22) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).

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

4.1.1.2 Phase I: Financial Bid

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

- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.
- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.
- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, **only** that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different

information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid.

- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 Phase III: Final Evaluation of the Bid

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

4.1.2 Technical Evaluation

4.1.2.1 Mandatory Technical Criteria

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

4.1.2.2 Point Rated Technical Criteria

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

4.1.3 Financial Evaluation

Financial evaluation is fully described in Annex "B3".

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

4.2 Basis of Selection

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

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation; and
- (b) meet all mandatory criteria; and
- (c) obtain the required minimum points specified for each criterion for the technical evaluation, and
- (d) obtain the required minimum of **810** points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of **1350** points.

Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.

2. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be **70%** for the technical merit and **30%** for the price.
3. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained *divided by* maximum number of points available *multiplied by* the ratio of **70%**.
4. To establish the pricing score, each ceiling price or rate will be prorated against the lowest ceiling price or rate for each individual category of service. The ratio of **30%** will be calculated as follows: Lowest Average Contract Ceiling Price for Initial and Optional Contract Periods *multiplied by* 30 points *divided by* Bidder's Average Contract Ceiling Price = Weighted Financial Score for Contract Ceiling Price.
5. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
6. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates **an example** where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$55,000.00.

Basis of Selection – Highest Combined Rating Technical Merit (70%) and Price (30%)

		Bidder A	Bidder B	Bidder C	Bidder D
Overall Technical Score		115/135	89/135	107/135	92/135
Average Bid Evaluation Price		\$55,000.00	\$64,298.00	\$69,996.87	\$71,409.33
Calculations	Technical Merit Score	$115/135 \times 70 = 59.630$	$89/135 \times 70 = 46.148$	$107/135 \times 70 = 55.481$	$92/135 \times 70 = 47.704$
	Total Weighted Financial Score (scores from table B.3.2 in Annex "B3")	30.000	25.662	23.572	23.106
Combined Rating		89.630	71.810	79.053	70.810
Overall Rating		1st	3rd	2nd	4th

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

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

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

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

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Canadian Content Certification

SACC Manual clause [A3050T](#) (2018-12-06) Canadian Content Definition

This procurement is limited to Canadian Services.

The Supplier certifies that:

() The service offered is a Canadian service as defined in paragraph 2 of clause A3050T.

Signature

Date

5.2.3.2 Status and Availability of Resources

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

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

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

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5.2.3.3 Education and Experience

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

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate.

Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

Signature

Date

5.2.3.4 Bilingual Capabilities

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

Signature

Date

5.2.3.5 Market Research Standards

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

Signature

Date

PART 6 - RESULTING CONTRACT CLAUSES

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

CONTINUOUS TRACKING OF CANADIANS' VIEWS - QUANTITATIVE SURVEY

POR # 122-18

6.1 Statement of Work

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

6.2 Standard Clauses and Conditions

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

Standard Instructions, General Conditions, Supplemental General Conditions and clauses incorporated by reference apply to and form part of the Contract.

6.2.1 General Conditions

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

6.2.2 Supplemental General Conditions

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

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

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

6.3 Security Requirements

There is no security requirement applicable to the Contract.

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from date of contract award to **April 30th, 2020***, inclusive.

Blackout Period: A Blackout Period is calculated from the moment the Project Authority provides a written notice (the "Blackout Period Notice") to the Contractor indicating the start date of a Blackout Period until the Project Authority provides a written notice to the Contractor indicating the end date of a Blackout Period. Typically, a Blackout Period would be initiated when a writ for a general federal election is issued by the Governor in Council, and would end following the swearing into office of a new government.

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Blackout Period Notice: Upon receipt of a Blackout Period Notice, the Contractor must immediately cease all fieldwork activities and submit a statement of account confirming the number of interviews completed to date, within 2 business days.

*** Extension period as a result of the blackout period:** The number of interviews missed during the Blackout Period will be carried out after the Contractor receives a written notice from the Project Authority indicating the end of the Blackout Period (to compensate for the missed data collection). The period of the contract will be extended for a period of time equal to the duration of the Blackout Period.

6.4.2 Option to Extend the Contract

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

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

6.5 Authorities

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Paola Amaral
Supply Specialist

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

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

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

6.5.2 Project Authority

The Project Authority for the Contract is:

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

Telephone: ____-____-_____
E-mail: _____

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

6.5.3 Contractor's Representative

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

Telephone: ____ - ____ - ____
E-mail: _____

6.6 Proactive Disclosure of Contracts with Former Public Servants

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

6.7 Payment

6.7.1 Basis of Payment – Ceiling Price

The Contractor will be paid for its costs reasonably and properly incurred in the performance of the Work, in accordance with the Basis of payment in Annex "B", to a ceiling price of \$ _____. Customs duties and Applicable Taxes are extra.

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

6.7.2 Monthly Payments

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

6.7.3 Electronic Payment of Invoices – Contract

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

a. _____

6.7.4 Discretionary Audit

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

6.8 Invoicing Instructions

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

Each invoice must be supported by:

- a. a copy of time sheets to support the time claimed;
 - b. a copy of the release document and any other documents as specified in the Contract;
 - c. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
 - d. a copy of the monthly progress report.
2. Invoices must be distributed as follows:
 - a. The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.
 - b. One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

6.9 Identification of the Fieldwork Sub-Contractor

The same sub-contractor will be required to complete all projects for the duration of the Contract unless authorized in writing by Public Works and Government Services Canada (PWGSC).

To replace the Fieldwork Sub-Contractor, the Contractor must submit all required documentation in accordance with the applicable rated requirements of the Request for Proposal (RFP).

The sub-contractor is:

Name of firm:
Address:
Telephone:
E-mail:

Note: The Contractor is responsible for assuring the quality of the Sub-Contractor's work.

6.10 Certifications and Additional Information

6.10.1 Compliance

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

6.10.2 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.

6.10.3 SACC Manual Clauses

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

6.11 Applicable Laws

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

6.12 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 supplemental general conditions [4008](#) (2008-12-12) – Personal Information;
- (c) the general conditions [2035](#) (2018-06-21) – General Conditions - Higher Complexity - Services;
- (d) Annex “A”, Statement of Work;
- (e) Annex “B”, Basis of Payment;
- (f) the Contractor's bid dated _____.

6.13 Political Neutrality Certification

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

6.14 Protection and Security of Data Stored in Database

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

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

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

ANNEX "A"

STATEMENT OF WORK

TITLE

Continuous Tracking of Canadians' Views - Quantitative Survey

BACKGROUND

The Privy Council Office (PCO) is the hub of non-partisan, public service support to the Prime Minister and Cabinet and its decision-making structures. Led by the Clerk of the Privy Council, PCO helps the Government implement its vision and respond effectively and quickly to issues facing the government and the country.

As an advisor to the Prime Minister, PCO brings together quality, objective policy advice and information to support the Prime Minister and Cabinet, including information on the priorities of Canadians.

To this end, the Communications and Consultation Secretariat within PCO supports the Prime Minister's Office in coordinating government communications and setting broad government communications themes and messages, in accordance with government priorities, as determined by the Prime Minister, Cabinet, Cabinet committees and the Clerk of the Privy Council. The Secretariat also works with PCO policy secretariats to advise and support Cabinet and its committees.

In fulfilling its mandate, PCO requires ongoing quantitative data collection to ensure that it has up-to-date representations of Canadians' opinions on macro-level issues that are of interest to the government, such as their views on what should be the priorities of the government. Additionally, such research increases our understanding of emerging trends, and will measure Canadians' views on key national issues and policy initiatives.

PURPOSE OF THE PROJECT AND OBJECTIVES

Through the use of a continuous telephone survey, PCO would like to gain a solid understanding of Canadians' views as they relate to the most important issues facing the country; their perceptions of how the federal government can best address these issues; expectations of actions related to government priorities; and perspectives on how the government can most effectively convey its efforts in dealing with emerging issues. Moreover, statistically representative data will enable PCO to measure changes in public perceptions over time.

This research will inform the development of communications messages, products and dissemination tactics to respond to priority issues. Additionally, the research will allow the Government of Canada to develop and refine communications activities to meet the specific needs of Canadians with timely, up-to-date, easily understood information based on the current perceptions of Canadians in the requisite areas.

TARGET POPULATION

The target population for the survey is all Canadians (aged 18+).

DATA COLLECTION

Data will be collected through a rolling poll. Over the course of one year (April 1st, 2019 – March 31st, 2020), the research firm will conduct a 14-minute telephone interview using random digit dialling (RDD) among a

random, probability-based, representative sample of 500 Canadians each week over the course of 50 weeks. At the culmination of the year, the sample will comprise 25,000 Canadians.

The research firm will be responsible for providing weekly and cumulative results in the form of an SPSS file, to be sent to the project authority. Data tables in English and French with cumulative results will be required once every 3 months. A methodology report will also be required on a quarterly basis.

In order to balance the proportion of younger Canadians (i.e. 18-34) in the sample so that it represents the Canadian population, the research firm will need to incorporate cell phone sample each week. The cell phone sample must also be RDD and probability-based.

The sample frame will therefore consist of, nationally, 49% landline respondents and 51% cell phone respondents each week. The research firm should also explain how they will ensure there is no overlap between landline and cell phone sample. The sample frame should consist of 50% women and 50% men for each age group (18 to 34; 35 to 54; 55+), and for each region:

- Atlantic Canada (Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick);
- Quebec;
- Ontario;
- Manitoba/Saskatchewan/Nunavut;
- Alberta/Northwest Territories;
- British Columbia/Yukon.

The table below provides the weekly number of landline and cell phone surveys in each province and territory that the research firm will need to complete to obtain the random, probability-based sample:

Mode	NL	NS	PE	NB	QC	ON	MB	SK	AB	BC	NU	NT	YT
Landline	6	11	3	9	60	70	16	12	26	28	1	1	1
Cell	4	9	2	6	40	85	15	14	39	42			

On a weekly basis, both the landline and cell sample must adhere to the following requirements:

- Data must be weighted by region, age group and gender;
- Probability-based sampling;
- Data collection must be conducted via RDD using live agents*. Any method for interacting with respondents other than a live agent at any point in the process cannot be used**;
- Databases, panels, or catalogues that have been created to identify, classify, and/or recruit individuals in advance cannot be used even if they have been developed using random probability-based sampling methods, with either live agents or through the application of any other technologies or methods.

*a live agent is a person making the call.

**This does not include using a predictive dialler to connect answered dials to live agents.

DESCRIPTION AND SCOPE OF THE WORK

The project authority will provide the research firm with the research instrument in English. The questionnaire will comprise core tracking questions and rotating questions on emerging key issues. The research firm should assume that on average, 30% of the content will change for each new week of data collection. The research firm should also assume that the questionnaire will include up to three open-ended questions that may change weekly, requiring coding.

The research firm will be required to carry out the following tasks:

1. Attend meetings (in person or via conference call) with the project authority to discuss research purpose and objectives, design issues, research schedule and draft report, etc.;
2. Ensure the research complies with the *Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys*;
3. Provide client liaison in either official language;
4. Review questionnaires provided by PCO, translate them into the other official language and revise them as required;
5. Program a questionnaire using a computer assisted telephone interviewing (CATI) system (or otherwise reproduce the questionnaire for interviews);
6. Inform respondents of their rights under the *Access to Information and Privacy Acts* (ATIP) and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying both the sponsoring department or agency and research firm; and informing respondents that their participation is voluntary and the information provided will be administered according to the requirements of the Privacy Act, the Personal Information Protection and Electronic Documents Act, the Access to Information Act, and any other pertinent legislation;
7. Pre-test the questionnaire in both English and French (with probing as per standards), and as needed each week thereafter. A minimum of 10 probing pre-test sessions are to be completed in English and French with the target audience. The project authority may also ask to monitor pre-tests;
8. Ensure effective quality control measures;
9. Ensure data is stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
10. Ensure that all aspects of data processing are conducted and only accessible in Canada, including fieldwork;
11. Conduct fieldwork in the preferred official language of the respondents, supervised by bilingual personnel to achieve the required completions. Calls are to be varied throughout the day, which includes both daytime and evening calls. This is limited to 9 p.m. in any given time zone;
12. Ensure effective bilingual quality control measures;
13. Ensure a minimum number of call backs (i.e. eight (8) for landline telephone interviews and five (5) for cell phone interviews);
14. Enter results and create tables and coding procedures defined in consultation with the project authority; code open ended questions off-line;
15. Identify the senior researchers managing the survey, their experience, and their replacement. Any changes in the project management team needs to be approved by the project authority.
16. Highlight any concerns, and potential recommendations, if any, with fielding this survey on a weekly basis. Examples of potential issues could include, but are not limited to (a) fielding the survey during holiday periods, e.g. Christmas/New Year period, March Break, Thanksgiving, etc., (b) data and report deliveries during holiday periods, (c) any other potential issues, etc.

Weekly Deliverables

17. Weekly: Provide the project authority with progress reports, including weighted partial results immediately following completion of each week of fieldwork (including SPSS format); produce an analysis plan for the data tables (also known as tabs or cross tabulations);
18. Weekly: Provide a complete copy of the cumulative data tables and raw data in machine-readable format (preferably in SPSS). All personal information/identifiers must be removed from the SPSS dataset;

Quarterly Deliverables

19. Quarterly: Provide a draft methodological report (including cumulative quarterly data tables) in the official language chosen by the project authority, interpreting the results based on the approved analysis plan;
20. Quarterly: Provide a final copy of the methodological report (electronic and hard copy) following receipt of the project authority's comments on the draft copy. The written report must include relevant content as per the [Public Opinion Research Final Report Requirements](#);
21. Quarterly: Provide and translate the methodological report(s) into the other official language;

General Deliverables

22. Perform other activities or services as per specific project requirements.

REPORTING DELIVERABLE REQUIREMENTS

The research firm will be responsible to:

- Meet or exceed the [Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys](#) as well as the relevant laws, regulations, and policies, for example, the *Personal Information Protection and Electronic Documents Act*, the *Privacy Act*, the *Federal Accountability Act*, *Official Languages Act*, and the Government of Canada Policy on Communications and Federal Identity; details can be found at <http://www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html>. Where no relevant Government of Canada standards exist, researchers must meet or exceed industry standards.
- The quarterly methodological report(s) need(s) to be in both official languages and in accordance with Library and Archives Canada deposit instructions (<http://www.bac-lac.gc.ca/eng/porr/Pages/help-submit-a-report.aspx>):
 - A narrative executive summary in English in web-accessible HTML5 format;
 - A narrative executive summary in French in web-accessible HTML5 format;
 - A written final report in English in web-accessible HTML5 format;
 - A written final report in French in web-accessible HTML5 format;
 - All of the above files (#1–4) must also be submitted in PDF/A (PDF/Archivable) format, but LAC does not require these to be web accessible;
 - All final reports must include a full description of the methodology used and all applicable appendices within the same digital file;
 - Where relevant, English and French research data must be sent in two different files, in CSV (Comma Separated Value) format (which almost any database software can export).
- The methodological report must also contain a discussion of the potential for non-response bias for the survey as a whole and for key survey variables. Non-response bias is the systematic difference between true population values and the average result from all possible samples owing to non-response.

- The analysis of non-response bias will consist of a comparison of at least three variables in the survey sample with the equivalent parameters of the population, normally available from Statistics Canada. No extra surveys or interviews are required.
- Provide weekly, monthly and quarterly data tables;
- Provide weekly, monthly and quarterly fully labelled SPSS datasets.

Report Requirements

A) The narrative executive summary in English and French should include the following information on the cover page:

1. The title of the project;
2. The name of the research firm that entered into the contract;
3. The contract number, the contract value and the award and delivery dates;
4. The POR Registration Number;
5. The name and email address of the client department or agency sponsoring the research;
6. Departmental signature and the Canada wordmark; and
7. For the English version, the statement "Ce rapport est aussi disponible en français" and for the French version, the statement "This report is also available in English."

B) The Copyright section must include the report's corresponding:

1. Government of Canada catalogue number;
2. International Standard Book Number (ISBN);
3. copyright notice with the year of publication;
4. departmental notice on the rights to reproduce the report.

C) The executive summary should consist of, at a minimum:

1. A statement of the research purpose and objectives;
2. A brief description of the methodology used;
3. A statement as to the extent to which the findings can be extrapolated to a broader audience;
4. An outline of how the results were used or how the information is expected to be used;
5. The contract value of the public opinion research study.

D) Political neutrality certification: The supplier must provide a political neutrality certification.

E) Each methodological report should have the same elements of the executive summary above and include the appendices listed below:

1. A full set of quarterly data tables;
2. A discussion of the potential for non-response bias;
3. The weighting procedures, the confidence interval and the margin of error;
4. The response rate and method of calculation;
5. The research instruments used;
6. All other information about the execution of the fieldwork that would be needed to replicate the research initiative.

TIMELINES

Outlined below is our proposed timing for the survey. Assuming a start date of April 1, 2019, the timing outlines activities for the first three weeks of the project. The research firm should assume that this three-week schedule will follow for each subsequent three-week period of the contract.

A sample calendar is provided on the following pages.

Week 1

Finalize methodology	April 1, 2019
Final questionnaire provided to research firm	April 4, 2019
Pre-test	April 5, 2019
Fieldwork launched	April 8, 2019
Week 1 fieldwork ends	April 14, 2019
Final uncoded data file	April 15, 2019
Fully coded SPSS data file	April 17, 2019

Week 2

Updated questionnaire provided to research firm	April 11, 2019
Pre-test	April 12, 2019
Fieldwork launched	April 15, 2019
Week 2 fieldwork ends	April 21, 2019*
Final uncoded data file	April 22, 2019
Fully coded SPSS data file	April 24, 2019

Week 3

Updated questionnaire provided to research firm	April 18, 2019
Pre-test	April 19, 2019*
Fieldwork launched	April 22, 2019*
Week 3 fieldwork ends	April 28, 2019
Final uncoded data file	April 29, 2019
Fully coded data tables and SPSS data file	May 1, 2019

*the timeline may be adjusted to account for statutory holidays

A final methodology report and a final set of data tables, including all data collected over the course of the year, will be due within two (2) weeks following the completion of data collection. Finalization of the methodology report will follow approval from project authority.

Calendar – Week 1

	First month					
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				New questions finalized for week 1		
	Launch survey for week 1					
End of data collection for week 1	Closed – ended data for week 1		Fully coded data for week 1			

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Calendar – Week 2

	First month					
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				New questions finalized for week 2		
	Launch survey for week 2					
End of data collection for week 2	Closed – ended data for week 2		Fully coded data for week 2			

Calendar – Week 3

	First month					
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				New questions finalized for week 3		
	Launch survey for week 3					
	Closed – ended data for week 3		Fully coded data for week 3			

Option Periods:

If exercised, the following would be the data collection timelines for the option periods:

First Option Year: April 1, 2020 to March 31, 2021
Second Option Year: April 1, 2021 to March 31, 2022

ANNEX "B"
**BASIS OF PAYMENT, PRICING – QUANTITATIVE SURVEYS,
AND FINANCIAL EVALUATION**

Annex "B1" – Basis of Payment
Annex "B2" – Pricing – Quantitative Surveys
Annex "B3" – Financial Evaluation

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ANNEX "B1"
BASIS OF PAYMENT

B1.1 NOTE TO BIDDERS

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

- Firm, all inclusive, hourly rates for all Professional Services;
- Firm, all inclusive, rates for Landline Telephone Interviewing;
- Firm, all inclusive, rates for Cell Phone Telephone Interviewing;
- Firm, all inclusive, hourly rates for Other Related Services;

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

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

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

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

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

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

All prices and amounts of money in the Contract are in Canadian currency, inclusive of Customs and duties, and are exclusive of Applicable Taxes unless otherwise indicated. The Applicable Taxes, whichever is applicable, is extra to the price herein and will be paid by Canada. Applicable Taxes, to the extent applicable, will be incorporated into all invoices and progress claims and shown as a separate item on invoices and progress claims. All items that are zero-rated, exempt or to which the Applicable Taxes does not apply, are to be identified as such on all invoices. The Contractor agrees to remit to Canada Customs and Revenue Agency any amounts of Applicable Taxes paid or due.

All deliverables are F.O.B. Destination.

B1.2 FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS

B1.2.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER

The survey field manager will be responsible to act as:

- Client liaison
- Immediate supervision of all aspects of the fieldwork, including:
 - ✓ programming of study questionnaire in CATI or equivalent software and data entry;
 - ✓ sample and quota management;
 - ✓ administration of pre-test;
 - ✓ on-going project support during data collection;
 - ✓ troubleshooting;
 - ✓ development of a code list for open ended questions;
 - ✓ data weighting;
 - ✓ monitoring of response rates and subsequent reporting;
 - ✓ provision of deliverables, including data files and detailed tables; and
- Outline variables and cross-tabulation of the requirements for the detailed tables including production of tables.

B1.2.2 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed prices includes the services described below:

- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a probability-based sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Personal Information Protection and Electronic Documents Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test. Please note that the 20 interviews is the total number of interviews for both landline and cell phone pre-tests;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;
- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;

-
- Making a minimum of 8 call backs;
 - Monitor call dispositions/reasons for non-response throughout the field period;
 - Providing quality control;
 - Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
 - All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
 - Coding of open ended questions off-line;
 - Assume 10% of the interview duration will include open-ended questions;
 - Data entry of results;
 - Create weekly frequencies and cross tabulation tables;
 - Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
 - Provide a methodological report (including cumulative quarterly data tables) with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "F"); and
 - Certify by the Contractor's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are all 18 years of age or older.

Rates are per individual interview completion.

B1.2.3 CELL PHONE TELEPHONE INTERVIEWS, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT

The fixed unit price includes the services described below:

- Programming a questionnaire to a CATI system, or otherwise reproducing the questionnaire for interviewers;
- Training and instructing interviewers;
- Purchase and administering a cell phone sample;
- Inform respondents of their rights under the *Privacy Act*, *Personal Information Protection and Electronic Documents Act* and *Access to Information Act* and ensure that those rights are protected throughout the research process. This includes: informing respondents of the purpose of the research; identifying the sponsoring department/agency or Government of Canada as a whole; that their participation is voluntary, and that the information provided will be administered according to the requirements of the *Privacy Act*, the *Personal Information Protection and Electronic Documents Act*, the *Access to Information Act*, and any other pertinent legislation;
- Pre-testing the questionnaire by completing a minimum of 20 questionnaires/interviews, 10 in English and 10 in French. The pre-test includes probing which invites participants to respond to 5 open-ended questions in order to provide their input about their comprehension of and reaction to the questions included in the pre-test. Please note that the 20 interviews is the total number of interviews for both landline and cell phone pre-tests;
- Canadian field staff placing telephone calls and telephone interviewing (includes long distance charges);
- Conduct fieldwork in the official language of the respondent supervised by bilingual personnel to achieve the required completions. In cases where the initial interviewer is not bilingual and the respondent requests the interview in the other official language, either an immediate transfer or call-

back within 20 minutes of the initial call must be made. This would apply unless the respondent prefers to arrange a call-back at a scheduled time that is more convenient for them;

- Calls and call-backs are to be varied through-out the day which includes both daytime and evening calling. This is limited to 9 p.m. in a given time zone;
- Making a minimum of 5 call backs;
- Monitor call dispositions/reasons for non-response throughout the field period;
- Providing quality control;
- Data is to be stored on Canadian servers and Canadian back-up servers. The database must be located and only accessible in Canada. It must also be physically independent from all other databases, directly or indirectly, that are located outside Canada;
- All aspects of data processing must be conducted and only accessible in Canada, including fieldwork;
- Coding of open ended questions off-line;
- Assume 10% of the interview duration will include open-ended questions;
- Data entry of results;
- Create weekly frequencies and cross tabulation tables;
- Providing a complete copy of the data tables and/or raw data in machine-readable format (preferably in SPSS version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Create and deliver a data file with all the results of the survey in SPSS format including verbatim responses (version 14 or later). All personal information/identifiers removed from the SPSS dataset;
- Provide a methodological report (including cumulative quarterly data tables) with a bilingual executive summary as per the Public Opinion Research Reporting check list (Annex "F"); and
- Certify by the Contractor's senior officer that the final deliverables comply with political neutrality requirements and do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

These rates assume that no screening criteria are applied except that the respondents are all 18 years of age or older.

Rates are per individual interview completion.

B1.3 SUBCONTRACTED SERVICES

The Contractor will be reimbursed at cost for any actual expenditures outside of the rates of the basis of payment reasonably and properly incurred to acquire goods and services from outside suppliers at the supplier's price, net of any trade or prompt payment discounts.

Note: Fixed unit costs for Fieldwork and Data Tabulation services contained in the Basis of Payment will be used in all circumstances including if work is sub-contracted.

B1.4 DIRECT EXPENSES – EXTERNAL AND INTERNAL

In certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses and outside of the rates of the basis of payment are required to complete the Work, such expenses may be allowable as direct expenses given the service(s) is/are documented in the approved Contract. All such direct expenses must have prior authorization of the Project Authority and will be invoiced at cost with no allowance for overhead or profit.

B1.5 PRICE SUPPORT

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

B1.6 CONTRACTUAL JOINT VENTURE (if applicable)

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

ANNEX "B2" PRICING – QUANTITATIVE SURVEYS

The Bidder must provide **firm rates**, in Canadian currency, taxes extra, for the initial period of the Contract and for each of the option periods thereafter.

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

B2.1 FIELDWORK AND DATA TABULATION FOR TELEPHONE SURVEYS

B2.1.1 PROJECT MANAGEMENT - SURVEY FIELD MANAGER

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

Survey Field Manager	Initial Contract Period		First Option Year		Second Option Year	
	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)	Hourly Rate (\$)	Level of Effort (# hours)
(Add lines if required)						
B2.1.1 TOTAL	\$ _____		\$ _____		\$ _____	

B2.1.2 LANDLINE TELEPHONE INTERVIEWING, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT – 14 MINUTES

TABLE B2.1.2 Firm rates for landline telephone interview completions with the adult general public, inclusive of data tabulation and methodological report:

Duration	Initial Contract Period Firm Rate (\$) for each sample	First Option Year Firm Rate (\$) for each sample	Second Option Year Firm Rate (\$) for each sample
14 minutes			
245 completions/week x 50 weeks	x 12,250	x 12,250	x 12,250

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B2.1.2 TOTAL	\$ _____	\$ _____	\$ _____
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B2.1.3 CELL PHONE TELEPHONE INTERVIEWS, INCLUSIVE OF DATA TABULATION AND METHODOLOGICAL REPORT – 14 MINUTES

These rates assume that no screening criteria are applied.

TABLE B2.1.3 Firm rates for cell phone telephone interview completions, inclusive of data tabulation and methodological report:

Duration	Initial Contract Period Firm Rate (\$) for each sample	First Option Year Firm Rate (\$) for each sample	Second Option Year Firm Rate (\$) for each sample
10 minutes			
255 completions/week x 50 weeks	x 12,750	x 12,750	x 12,750
B2.1.3 TOTAL	\$ _____	\$ _____	\$ _____

B2.1.4 OTHER PROFESSIONAL RATES

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

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

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

B2.1.5 DIRECT AND SUB-CONTRACTED EXPENSES

The Bidder should provide an estimated cost, excluding GST/HST, for direct and subcontracted expenses for each contract period. As per B1.3 and B1.4 these costs are to be billed at cost, with no allowance for overhead or profit.

Direct and Sub-contracted Expenses Breakdown	Initial Contract Period	First Option Year	Second Option Year

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(Add lines if required)			
TOTAL	\$ _____	\$ _____	\$ _____

B2.2 ALL INCLUSIVE CEILING PRICE

The following table is the all-inclusive ceiling price submitted by the Bidder for the initial contract period and for each additional option years. The average between all periods will be used as the Bid Evaluation Value.

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

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

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ANNEX "B3" FINANCIAL EVALUATION

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

• B3.1 Contract Ceiling Price for Initial and Option Periods

The entire Financial Evaluation is worth 30% of the total proposal final score. The allotment per step above will be as follows:

POINTS ALLOTTED TABLE:

Steps of Financial Evaluation	Weighting	Points Allotted (for calculation purposes)
B3.1 Contract Ceiling Price for Initial and Option Periods	100%	30

Solicitation No. - N° de l'invitation
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TOTAL	100%	30
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B3.1 CONTRACT CEILING PRICE FOR INITIAL AND OPTION PERIODS

Step 1: An average contract ceiling price will be calculated using the ceiling price submitted for each years of the contract (initial 1-year period, first option and second option) in B2.1.1, B2.1.2, B2.1.3, B2.1.4, and B2.1.5.

Example of Step 1:

Bidder	Ceiling Price for Initial Contract Period	Ceiling Price for First Option Period	Ceiling Price for Second Option Period	Average Contract Ceiling Price
Bidder A	\$50,000.00	\$55,000.00	\$60,000.00	\$55,000.00
Bidder B	\$60,000.00	\$64,200.00	\$68,694.00	\$64,298.00
Bidder C	\$65,000.00	\$69,875.00	\$75,115.62	\$69,996.87
Bidder D	\$70,000.00	\$71,400.00	\$72,828.00	\$71,409.33

B3.2 TOTAL WEIGHTED FINANCIAL SCORE

Step 1:

The weighted Financial Score will be determined for each Bidder.

The multiplier for this calculation is the points allotted per category of service in the table of **Step 1** in B3.1 above.

Example of Step 1:

Lowest Average Contract Ceiling Price X 30 *divided by* Bidder's Average Contract Ceiling Price = Weighted Financial Score for Contract Ceiling Price for Initial and Option Periods

Bidder	Average Contract Ceiling Price	Total Weighted Financial Score
Bidder A	\$55,000.00	30.000
Bidder B	\$64,298.00	25.662
Bidder C	\$69,996.87	23.572
Bidder D	\$71,409.33	23.106

ANNEX "C"
EVALUATION GRIDS

EVALUATION SUMMARY		
1. MANDATORY REQUIREMENTS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET CERTIFICATIONS: <input type="checkbox"/> MET <input type="checkbox"/> NOT MET		
2. RATED REQUIREMENTS:	Minimum / Maximum Points Required	Points Achieved
R.1: Understanding the Requirement	30 / 50	_____
a) Understanding the Purpose of the Research	30 / 50	_____
R.2: Methodology	480 / 800	_____
a) Methodology and Research Procedures	120 / 200	_____
b) Data Collection Procedures	90 / 150	_____
c) Data Collection and Quality Control	90 / 150	_____
d) Addressing Methodological Requirements	90 / 150	_____
e) Issues and Challenges	90 / 150	_____
R.3: Fieldwork Manager – Qualifications	90 / 150	_____
a) Academic Qualifications	30 / 50	_____
b) Work Experience	60 / 100	_____
R.4: Fieldwork Manager – Sample Projects	60 / 100	_____
a) Project #1	30 / 50	_____
b) Project #2	30 / 50	_____
R.5: Fieldwork Firm / Sub-Contractor's Experience	150 / 250	_____
a) Recency of the Project	72 / 120	_____
b) Sample Size and Questionnaire Duration	48 / 80	_____
c) Sampling Distribution	30 / 50	_____
OVERALL TOTAL	810* / 1350	_____

*The overall total points must be a minimum of 810 points, including a passing mark of 60% for each sub-criteria.

1. MANDATORY TECHNICAL EVALUATION CRITERIA

Bidders must meet **ALL** of the Mandatory Evaluation Criteria. If a bidder fails to meet any of the Mandatory Evaluation Criteria the bid will not be evaluated any further.

MANDATORY CRITERIA		REFERENCED SECTION IN BIDDER'S PROPOSAL	MET	NOT MET
M.1	<p>FIELDWORK MANAGER</p> <p>The bidder must identify one (1) fieldwork manager who is able to communicate with the project authority in English and one (1) fieldwork manager who is able to communicate with the project authority in French. The individual identified for each language can be the same person. The bidder must provide the curriculum vitae of the proposed fieldwork manager. The curriculum vitae should include:</p> <ul style="list-style-type: none"> a) the candidate's professional experience; b) the candidate's employment history, starting with the present (in months/years), and including a brief description of each role; c) the candidate's education, including the field of study, memberships, publications, certification and training; d) the candidate's oral and written language capabilities or proficiency for each of the two (2) official languages of Canada (i.e. English and French). 			
<p>Comments:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>				
M.2	<p>FIELDWORK MANAGER – SAMPLE PROJECTS</p> <p>The bidder must demonstrate the experience of each of the proposed fieldwork managers in the following way. The bidder must submit two (2) quantitative telephone surveys that each fieldwork manager has produced and completed* in Canada in the two (2) years preceding the bid closing date. The samples submitted will be evaluated in the Point Rated Technical Evaluation <i>R.4 – Fieldwork</i></p>			

	<p><i>Manager – Sample Projects.</i> Please use the sample project format in R.4 to submit sample projects.</p> <p>*Completed is defined as when the final data was submitted to the client.</p> <p>At least one (1) of the two (2) projects submitted must include a tracking telephone survey**, with multiple waves (minimum two (2)) in which a minimum of 500 respondents were contacted per wave.</p> <p>**A tracking survey is defined as asking a randomly selected sample (target population) the same set of questions at different time intervals to measure changes in responses over time. The sample (target population) for each time interval (i.e. wave) does not need to consist of the same respondents.</p> <p>At least one (1) of the two (2) projects submitted must be national*** in scope, and must demonstrate that a final sample is representative**** of the target population in terms of age, gender, and region/province, based on Statistics Canada data at the time of study.</p> <p>***National is defined as a project being delivered in at least four (4) regions of Canada. One (1) of these regions must be Quebec. The regions are:</p> <ul style="list-style-type: none"> • British Columbia; • Prairies (Alberta, Saskatchewan, Manitoba); • Ontario; • Quebec; • Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador); and • The Territories (Yukon, Northwest Territories, Nunavut). <p>**** Representative is defined as a final sample that is composed of individuals who have been randomly selected from the adult Canadian population, and thus the sample is an accurate reflection of the adult Canadian population. The final sample proportion must be within +/-2% of the population proportion.</p>			
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Comments:				
M.3	FIELDWORK FIRM / SUB- CONTRACTORS All fieldwork must be completed in Canada. The bidder must identify whether all fieldwork will be conducted with either: <ul style="list-style-type: none"> • in-house resources; • a sub-contractor; or • a combination of in-house resources and a sub-contractor. If a firm is using in-house resources, the firm will be required to complete all projects for the duration of the contract using these in-house resources unless authorized in writing by Public Works and Government Services Canada. If a sub-contractor is involved, the same sub-contractor will be required to complete all projects for the duration of the contract unless authorized in writing by Public Works and Government Services Canada. In the case of the use of a sub-contractor, the bidder must provide: <ul style="list-style-type: none"> • the name of the sub-contractor; • the number of years in business; and • the research components for which they will be responsible. 			
	Comments:			
M.4	FIELDWORK FIRM / SUB- CONTRACTOR – PROJECT SAMPLES			

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	The bidder must submit a minimum of three (3) but no more than five (5) quantitative telephone surveys completed in Canada by the fieldwork firm / sub-contractor identified in <i>M.3</i> . At a minimum, one (1) project must be a tracking survey, with at least two (2) waves in which a minimum of 500 respondents were contacted per wave. The samples will be evaluated in the Point Rated Technical Evaluation <i>R.5 – Fieldwork Firm / Sub-Contractor's Experience</i> .			
Comments: 				
M.5	FINANCIAL PROPOSAL / BASIS OF PAYMENT The bidder must provide rates for the initial contract period and each of the option periods in accordance with Annex "B2" - Basis of Payment, Pricing – Quantitative Surveys.			
Comments: 				

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

2. POINT RATED TECHNICAL EVALUATION CRITERIA¹

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

R.1: UNDERSTANDING THE REQUIREMENT (Minimum 30, Maximum 50 points):

The response should include a narrative summary that reflects the understanding of the Statement of Work. Simply repeating the Statement of Work, in whole or in part, does not indicate an understanding of the project's aims and objectives or the ability to carry it out. Understanding of the requirement should include:

Criterion	Percentage (%)	Points
a) Understanding the purpose of the research and how it applies to the roles and responsibilities of PCO. The summary includes an understanding of the purpose of the research, and how it applies to the roles and responsibilities of PCO as it relates to this project.		/50
TOTAL POINTS		
Comments: 		

Points	Rating Level
Unacceptable (0 points)	Not provided.
Partially Addressed (40% of points)	The summary demonstrates minimal understanding of the Statement of Work. Elements are missing or unclear.
Addressed (60% of points)	The summary demonstrates a basic understanding of the Statement of Work. The summary includes a basic understanding of the purpose of the research.

¹ Where applicable, the relevant sections of the [Standards for the Conduct of Government of Canada Public Opinion Research—Telephone Surveys](#) will be used to evaluate the comprehensiveness of the response for rated the criteria.

Points	Rating Level
Very Well Addressed (80% of points)	The summary provides a clear understanding of the Statement of Work. The summary includes a clear understanding of the purpose of the research, and how it applies to the roles and responsibilities of PCO as it relates to this project.
Outstanding (100% of points)	The summary provides a clear and comprehensive understanding of the Statement of Work. The summary includes a clear and comprehensive understanding of the purpose of the research, and how it applies to the roles and responsibilities of PCO as it relates to this project.

Relevant sections of the Standards for the Conduct of Government of Canada Public Opinion Research—Telephone Surveys will be used to evaluate the comprehensiveness of the response for the rated criteria.

R.2: METHODOLOGY (Minimum 480 points* - Maximum 800 points)

The response should include a complete description of the methodology and research procedures, including data collection techniques; response should demonstrate how they will achieve the completions required by describing the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates and how they will be achieved, and the procedures they intend to follow to obtain the required number of completions.

*Please note that the minimum overall passing mark is 60% of the total. However, **EACH** of the sections below must also achieve the minimum 60% passing mark in order to be responsive.

The following rated criteria will be used for evaluation:

Criterion	Percentage (%)	Points
Section I: Methodology and Research Procedures <ul style="list-style-type: none"> The degree to which the response describes a suitable methodology, including the size of the eligible population, the methodology by which they will locate eligible respondents, the expected response rates and how they will be achieved. The response should also demonstrate how their sample is representative of the population. 		/200
Section II: Data Collection Procedures <ul style="list-style-type: none"> The degree to which the response describes suitable data collection procedures as it relates to the Data Collection section in the SOW. 		/150

<p>Section III: Data Collection Capability and Quality Control</p> <ul style="list-style-type: none"> The degree to which the response describes a suitable data collection capability and all quality control mechanisms that will be in place to ensure the reliability and validity of the results. The degree to which the response indicates the anticipated response rate and detail the steps that will be taken to achieve the probability-based sample and response rate. 		/150
<p>Section IV: Addressing Methodological Requirements</p> <ul style="list-style-type: none"> The degree to which the response describes a suitable rationale for the approach and a description for each of the following: <ul style="list-style-type: none"> Margin of error, non-response bias, urban/rural/provincial coverage, sampling issues, extrapolation to the population, response rates, ensuring there is no overlap between cell and landline sample for each wave, each month. 		/150
<p>Section V: Addressing Issues and Challenges</p> <ul style="list-style-type: none"> The degree to which the response addresses issues and challenges and proposed solutions for each of the following stages of a data collection period, including: <ul style="list-style-type: none"> survey programming, pre-testing, data collection, coding, weighting, final data, reporting, and overall scheduling and project management. 		/150
TOTAL POINTS		
<p>Comments:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>		

Points	Rating Level for Sections I, II, III, IV, V
Unacceptable (0 points)	Not provided.
Partially Addressed (40% of points)	Information was provided, but with only partial description of the Bidder's ability to meet the criteria. There are discrepancies and/or deficiencies that pose some risks to the requirement.
Addressed (60% of points)	Complete description provided of the Bidder's ability to meet the criteria. Some weaknesses or deficiencies but none are of major concern.
Very Well Addressed (80% of points)	Complete and clear description provided that demonstrates the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear rationale for each proposed idea.
Outstanding (100% of points)	Complete and clear description provided that goes beyond the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear and comprehensive rationale for each proposed idea.

R.3: FIELDWORK MANAGER - QUALIFICATIONS (Minimum 90 points, Maximum 150 points):

The curriculum vitae of each fieldwork manager proposed in M.1 will be evaluated as follows:

- a) **Academic qualifications / training / certifications / publications / awards and memberships** relevant to public opinion research fieldwork management, including communication of survey pre-test and results.

(Minimum 30 points, Maximum 50 points)

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

Academic Qualifications										
Name of Fieldwork Manager	Academic Qualifications					Certifications / Training (Accreditations, certifications, etc. / Courses / Workshops / Seminars / Conferences) Max 1 points	Publications (Academic papers, professional association articles, reports) Max 1 point	Memberships (ie: Canadian or International POR or marketing research association, or equivalent) Max 1 point	Awards Max 1 point	Total Points
	High School (25 points)	College – not relevant* (30 points)	College – relevant* (36 points)	University – not relevant* (43 points)	University – relevant* (46 points)					
	/24 pts	/30 pts	/36 pts	/42 pts	/46 pts					
Total Points										
Final Score (Average points for all fieldwork manager)										
Comments:										

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

- b) **Work experience** –the proposal should state the total number of months and years (ie: 6 years and 4 months of relevant experience for each proposed fieldwork manager.

(Minimum 60 points, Maximum 100 points)

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

Name of Fieldwork Manager	Number of years overall of relevant experience					Total Points
	Less than 5 years 50 points	Equal to 5 years but less than or equal to 6 years 60 points	Greater than 6 years but less than or equal to 7 years 70 points	Greater than 7 years but less than or equal to 8 years 80 points	Greater than 8 years 100 points	

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Total Points						
Final Score (Average points for all fieldwork manager)						
Comments:						

R.4: FIELDWORK MANAGER – SAMPLE PROJECTS (Minimum 60 points - Maximum 100 points)

The two (2) projects submitted under mandatory requirement M.2 will be evaluated under this point rated evaluation. Bidders are requested to use the following PROJECT SAMPLE FORMAT for each project submitted:

Projects can include any target audience (e.g. Indigenous, ethno-cultural groups, seniors, youth, general population, etc), as long as the project was conducted in Canada with Canadians.

PROJECT SAMPLE FORMAT

SECTION I: BACKGROUND INFORMATION (5 points)

Project Title:

Client Name:

Delivery Dates of Final Data/Report:

Fieldwork Location(s):

Sample Size per Wave:

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

SECTION II: PROJECT BACKGROUND (15 points)

Describe your client's requirement, challenge, or opportunity and what your company was hired to do. Include a description of the product/service/social issue and the target audience(s).

SECTION III: METHODOLOGY (30 points)

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

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

Name of Fieldwork Manager	Project # 1 (Maximum 50 points)				Project # 2 (Maximum 50 points)				Total Points
	S.I (5)	S.II (15)	S.III (30)	TOTAL (50)	S.I (5)	S.II (15)	S.III (30)	TOTAL (50)	
Total Points									
Final Score (Average points for all fieldwork managers)									

Points	Rating Level for Sections I, II, III
Unacceptable (0 points)	Information is not provided .
Partially Addressed (40% of points)	Minimal information provided. Elements are missing or unclear.
Addressed (60% of points)	Information clearly provided. Some weaknesses or deficiencies but none are of major concern.
Very Well Addressed (80% of points)	Information provided is clear and detailed . No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear description for section.
Outstanding (100% of points)	Information provided is clear and detailed and goes beyond the ability to meet the criteria. No weaknesses or deficiencies that would pose any risk to the requirement. The response includes a clear and comprehensive description for each section.

R.5: FIELDWORK FIRM / SUB-CONTRACTORS – EXPERIENCE (Minimum 150 points - Maximum 250 points)

The proposal should identify and describe in detail a minimum of three (3) but no more than five (5) quantitative telephone surveys completed in Canada by the fieldwork firm / sub-contractors identified in M.3. Each project should have been completed in Canada with a minimum of one thousand (1000) survey completions using random digit dialing and should involve a minimum survey duration of five (5) minutes. The projects cited in M.2 and M.4 can be resubmitted for this rated criterion provided they meet all the elements required in R.5. Relevant projects conducted for clients in or outside the Government of Canada will be given equal weight in the evaluation process.

Projects can include any target audience (e.g. Indigenous, ethno cultural groups, seniors, youth, general population, etc.), as long as the project was conducted in Canada with Canadians.

The proposal should use the following layout to describe each project:

- Project title;
- Fieldwork start and end dates (Month/Year). For tracking projects, this should include the start and end dates of each wave;

- Client name and telephone number;
- Methodology including:
 - the number of survey completions and characteristics of respondents;
 - questionnaire duration;
 - sample design; and
 - the number of overall completions, and completions per wave.

Project experience will be evaluated based on the following criteria:

- a) **Recency of the Project:** The project fieldwork was completed in the two (2) years preceding the bid closing date by the bidder's proposed fieldwork firm. **(Minimum 84 points, Maximum 120 points)**

a) Recency of the Project	Project 1 Yes/No	Project 2 Yes/No	Project 3 Yes/No	Project 4 Yes/No	Project 5 Yes/No	Total points assigned (Maximum 120 points)
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						

1 Project	2 Projects	3 Projects	4 Projects	5 Projects
24 points	48 points	72 points	96 points	120 points

- b) **Sample Size and Questionnaire Duration:** There were a) at least one thousand (1000) survey completions using probability sampling and b) involving minimum survey duration of at least five (5) minutes. **(Minimum 56 points, Maximum 80 points)**

b) Sample Size and Questionnaire Duration	Project 1 Yes/No	Project 2 Yes/No	Project 3 Yes/No	Project 4 Yes/No	Project 5 Yes/No	Total points assigned (Maximum 80 points)
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						

1 Project	2 Projects	3 Projects	4 Projects	5 Projects
16 points	32 points	48 points	64 points	80 points

- c) **Sampling Distribution**: a) national in scope as defined in M2 and b) the final sample is representative of the target population as defined in M2 by region/province (**Minimum 35 points, Maximum 50 points**)

c) Sampling Distribution	Project 1 Yes/No	Project 2 Yes/No	Project 3 Yes/No	Project 4 Yes/No	Project 5 Yes/No	Total points assigned (Maximum 50 points)
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						
(Name of firm or fieldwork Sub-contractor)						

1 Project	2 Projects	3 Projects	4 Projects	5 Projects
10 points	20 points	30 points	40 points	50 points

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ANNEX "D"
to PART 3 OF THE BID SOLICITATION

ELECTRONIC PAYMENT INSTRUMENTS

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

- ☐ () VISA Acquisition Card;
- ☐ () MasterCard Acquisition Card;
- ☐ () Direct Deposit (Domestic and International);

**ANNEX "E" to PART 5 OF THE BID SOLICITATION
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 permanent full-time and/or permanent part-time employees.

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)

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ANNEX "F"
POLITICAL NEUTRALITY CERTIFICATION

Political Neutrality Certification

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

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

Signature

Date

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ANNEX "G"
PUBLIC OPINION RESEARCH FINAL REPORT CHECKLIST

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

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ANNEX "H"
RFP SUBMISSION FORM / SUBCONTRACTOR INFORMATION

*Please see Word Document labelled "Annex H – RFP Submission Form"
and available for download on buyandsell.gc.ca*

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ANNEX "I"
ATTESTATION SAMPLE

Name of contractor: _____

Project title: _____

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

Signature

Date