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PART 1 - GENERAL INFORMATION

1.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program of Public Works and Government Services Canada](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2 Statement of Work

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

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.

1.4 Trade Agreements

The requirement is subject to the provisions of the North American Free Trade Agreement (NAFTA), the Canada-Chile Free Trade Agreement, the Canada-Colombia Free Trade Agreement, the Canada-Honduras Free Trade Agreement, the Canada-Korea Free Trade Agreement, the Canada-Panama Free Trade Agreement, the Canada-Ukraine Free Trade Agreement and the Canadian Free Trade Agreement (CFTA).

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

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

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

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

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

Delete: 60 days

Insert: 90 days

2.2 Submission of Bids

Bids must be submitted only to Public Health Agency of Canada (PHAC) Contracting Authority by the date, time and place indicated in the bid solicitation.

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

2.3 Former Public Servant

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

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

- a. name of former public servant;

- b. date of termination of employment or retirement from the Public Service.

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

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

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

2.6 Basis for Canada's Ownership of Intellectual Property

The Public Health Agency of Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, 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

Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid: One electronic (PDF) copy;
Section II: Financial Bid: One electronic (PDF) copy;
Section III: Certifications: One electronic (PDF) copy

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 a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

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

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment.

Section III: Certifications

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

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

#	Description	Met/Not Met	Reference to proposal/Page #
MT1	The bidder must demonstrate, by providing copies and/or electronic links, that the proposed resource is the primary author of one (1) peer-reviewed publication or technical report in the last five (5) years related to: <ul style="list-style-type: none"> a. Health Technology Assessment; and/or b. Economic Evaluation 		
MT2	The bidder must demonstrate that the proposed resource has a PhD (or is in the later stages of a PhD program) from a recognized post-secondary institution in a field relevant to the work, such as: <ul style="list-style-type: none"> a. Health Economics; or b. Health Technology Assessment; or c. Health Services Research/Methodology OR has a valid Master's degree in a field relevant to the work PLUS two (2) years of demonstrated work experience involving projects related to economic evaluations or health technology assessment.		
MT3	The bidder must propose a work plan that identifies how they will address the tasks identified in Article 2.1 of the statement of work, including: <ul style="list-style-type: none"> a. The proposed strategies for the proposed resource to complete each task and the estimated timelines for completion; b. Potential risks and mitigation strategies for each; and c. Quality assurance 		
MT4	The bidder must demonstrate, by providing detailed project descriptions, that the proposed resource has 2 years' experience in the last 5 years, conducting literature reviews/systematic reviews from peer-reviewed literature and/or grey literature (ex. i.e., agency reports, conference posters, websites, etc.) in the areas of: <ul style="list-style-type: none"> a. Economic evaluation; and/or b. Economic guidelines; and/or c. Epidemiology. 		

4.1.1.2 Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below.

Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately.

#	DESCRIPTION	MAX POINTS	ACTUAL SCORE	COMMENTS
RT1	<p>The bidder should demonstrate, by providing up to four (4) detailed project descriptions, that within the last five (5) years, the proposed resource has designed and/or developed and or conducted the review of economic evaluations of health interventions such as:</p> <ul style="list-style-type: none"> a. Health technologies (i.e. vaccines, drugs, devices); or b. Health programs (i.e. medical services, immunization programs) <p>Project descriptions should include:</p> <ul style="list-style-type: none"> i. The name and contact information of the client (telephone number and email address) (public or private); ii. The start and end dates; iii. A brief description of the scope / complexity of the project. <p>Canada may contact reference to validate experience.</p> <p>POINTS ALLOCATION:</p> <p>Two (2) points per project up to a maximum of eight (8) points.</p>	/8	/8	
RT1A	<p>The bidder should demonstrate, by referencing the project descriptions in RT1, that they have experience using the following guidelines:</p> <ul style="list-style-type: none"> a. Canadian Agency for Drugs and Technologies in Health (CADTH); and/or b. Second Panel on Cost-Effectiveness in Health and Medicine; and/or c. World Health Organization (WHO) Guide for Standardization of Economic Evaluations of Immunization Programmes. 	/3	/3	

	<p>POINTS ALLOCATION:</p> <p>One (1) point per guideline to a maximum of three (3) points.</p>			
RT2	<p>The bidder should demonstrate, by providing up to four (4) detailed project descriptions, that within the last five (5) years, the proposed resource has worked collaboratively with internal and external stakeholders in the following fields:</p> <ul style="list-style-type: none"> a. Health technologies (i.e. vaccines, drugs, devices); or b. Health programs (i.e. medical services, immunization programs) <p>Project descriptions MUST include:</p> <ul style="list-style-type: none"> i. The name and contact information of the client (telephone number and email address) (public or private); ii. The start and end dates; iii. A brief description of the scope / complexity of the project; <p>Canada may contact reference to validate experience.</p> <p>POINTS ALLOCATION:</p> <p>Two (2) points per project up to a maximum of eight (8) points.</p>	/8	/8	
RT2A	<p>The bidder should demonstrate, by referencing the project descriptions in RT2 that the proposed resource made an oral presentation to a provincial, national or international audience.</p> <p>Oral presentations MUST:</p> <ul style="list-style-type: none"> i. Have been for a minimum of thirty (30) minutes; and ii. Have been for health professionals, researchers or policy makers. <p>POINTS ALLOCATION:</p> <p>One (1) point for each oral presentation up to a maximum of two (2).</p>	/2	/2	

RT3	<p>The bidder should demonstrate, by providing up to two (2) detailed project descriptions, that within the last five (5) years, the proposed resource has written or edited guidelines related to health interventions (i.e. economic, clinical, standard operating procedures); OR Participated in up to two (2) methodological studies related to economic evaluations or health economics.</p> <p>Project descriptions should include:</p> <ul style="list-style-type: none"> i. The name and contact information of the client (telephone number and email address) (public or private); ii. The start and end dates; iii. A brief description of the scope / complexity of the project. <p>Canada may contact reference to validate experience.</p> <p>POINTS ALLOCATION:</p> <p>Two (2) points per project up to a maximum of four (4) points.</p>	/4	/4	
RT4	<p>The bidder should demonstrate, by providing and/or referencing existing detailed project descriptions and/or completed professional training course descriptions (e.g. immunology), that the proposed resource has experience/training related to infectious diseases.</p> <p>POINTS ALLOCATION:</p> <p>Two (2) points per project / course up to a maximum of four (4) points.</p>	/4	/4	
RT4A	<p>The bidder should demonstrate, by referencing the projects/courses in RT4, that the proposed resource's infectious disease-related experience/training is specific to the immunization system in Canada or vaccines.</p> <p>POINTS ALLOCATION:</p> <p>Two (2) points per project / course up to a maximum of four (4) points.</p>	/4	/4	

RT5	<p>The overall proposal will be evaluated for quality and clarity.</p> <p>POINTS ALLOCATION:</p> <p>10 points: The proposal is well organized, easy to follow and fully addresses the requirements of the SOW. The proposed work plan is thorough and logical and demonstrates full understanding of the current requirement. The examples of work demonstrate excellent ability to write clear, concise, scientifically accurate texts.</p> <p>5 points: The proposal is somewhat organized and/or somewhat easy to follow. It mostly addresses the requirements of the SOW. The proposed work plan lacks detail and does not thoroughly demonstrate understanding of the current requirement. The examples of work demonstrate a somewhat clear ability to write, concise, scientifically accurate texts.</p> <p>0 points: The proposal is not well organized and difficult to follow. It does not address the requirements of the SOW. The proposed work plan is not present and/or does not demonstrate any understanding of the current requirement. The examples of work do not adequately demonstrate the ability to write clear, concise, scientifically accurate texts.</p>	/10	/10	
Total score (minimum of 26 overall required):			/43	

4.2 Basis of Selection

4.2.1 Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 26/43 points overall for the technical evaluation criteria which are subject to point rating.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 80 % for the technical merit and 20% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 80 %.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 20 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 80/20 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (80%) and Price (20%)				
		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 80 = 68.15$	$89/135 \times 80 = 52.74$	$92/135 \times 60 = 54.52$
	Pricing Score	$45/55 \times 20 = 16.36$	$45/50 \times 20 = 18.00$	$45/45 \times 20 = 20.00$
Combined Rating		84.51	70.74	74.52
Overall Rating		1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Additional Certifications Precedent to Contract Award

5.2.2.1 Status and Availability of Resources

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

5.2.2.2 Education and Experience

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

PART 6 - RESULTING CONTRACT CLAUSES

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

6.1 Security Requirements

Unscreened contractors must be escorted by an employee or Commissionaire at all times when visiting Government of Canada facilities.

Information which is to be used in the development of the contracted product, as reference material or otherwise made available to the contractor must be unclassified material and considered to be releasable to the public by Health Canada/Public Health Agency of Canada and/or The Government of Canada.

No Protected or Classified information is to be made available to the contractor, used in the production of the contracted product, or produced as a result of this contract.

6.2 Statement of Work

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

6.3 Standard Clauses and Conditions

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

6.3.1 General Conditions

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

6.3.2 Supplemental General Conditions

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

6.4 Term of Contract

6.4.1 Period of the Contract

The period of the Contract is from April 1, 2019 to March 31, 2021 inclusive

6.5 Authorities

6.5.1 Contracting Authority

Name: Erin Massey
Title: Senior Procurement and Contracting Officer
Health Canada and the Public Health Agency of Canada
Chief Financial Officer Branch
Directorate: Materiel and Assets Management
Address: 200 Eglantine Driveway, Ottawa, ON K1A 0K9
Telephone: 613-941-2094
E-mail address: erin.massey@canada.ca

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

6.5.2 Project Authority (to be identified at contract award)

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ____ _
E-mail address: _____

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

6.5.3 Contractor's Representative (to be identified at contract award)

Name: _____
Title: _____
Organization: _____
Address: _____
Telephone: ____ _
E-mail address: _____

6.6 Proactive Disclosure of Contracts with Former Public Servants

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

6.7 Payment

6.7.1 Basis of Payment – Firm Hourly Rates

The Contractor will be paid firm hourly rates as per Annex B, for work performed in accordance with the Contract. Customs duties are excluded and Applicable Taxes are extra.

Total Estimated Cost: \$ _____

Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](#), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

All travel must have the prior authorization of the Project Authority. All payments are subject to government audit.

Estimated cost: \$ _____

6.7.2 Limitation of Price

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

6.7.3 Method of Payment – Milestone Payments

SACC Manual clause [H3010C](#) (2016-01-28), Milestone Payments – Not subject to holdback

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 is 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;
2. Invoices must be distributed as follows:
 - a. The original must be forwarded to hc.p2p.east.invoices-factures.est.sc@canada.ca for certification and payment.

6.9 Certifications and Additional Information

6.9.1 Compliance

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

6.10 Applicable Laws

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

6.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions [4007](#) (2010-08-16) Canada to Own Intellectual Property Rights in Foreground Information;
- (c) the general conditions [2010B](#) (2018-06-21) General conditions: Professional Services (medium complexity);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) the Contractor's bid dated _____

6.12 Insurance

SACC Manual clause [G1005C](#) (2016-01-28), Insurance – No Specific Requirement

ANNEX A - STATEMENT OF WORK

National Advisory Committee on Immunization: Economic Guidelines Task Group Writer

1. Scope

1.1. Introduction

The National Advisory Committee on Immunization (NACI) is an independent advisory body of experts in the fields of paediatrics, infectious diseases, immunology, medical microbiology, internal medicine and public health. The Committee reports to the Vice President, Infectious Disease Prevention and Control Branch (IDPCB), Public Health Agency of Canada (PHAC) and works with staff of the Centre for Immunization and Respiratory Infectious Diseases (CIRID).

NACI makes recommendations for the use of vaccines currently or newly approved for use in humans in Canada, including the identification of groups at risk for vaccine-preventable diseases for whom vaccination should be targeted. These recommendations include programmatic factors such as economics. NACI recommendations are published in advisory committee statements (<http://www.phac-aspc.gc.ca/naci-ccni/index-eng.php#rec>) as well as in the Canadian Immunization Guide (<http://www.phac-aspc.gc.ca/publicat/cig-gci/index-eng.php>).

Within NACI, there are two working groups that oversee economic considerations. The Economics Task Group (ETG) is mandated to oversee and provide feedback on the development of economic processes and frameworks. The newly formed Economic Guidelines Task Group is mandated to develop economic guidelines to help standardize and facilitate the economic evaluation of vaccines in Canada.

1.2. Objectives of the Requirement

The Contractor is to draft the economic guidance document under the direction of the Economic Guidelines Task Group. The guidelines are for economic evaluations of vaccines in Canada. Specifically, they will inform best practices for conducting and reporting economic evaluations.

1.3. Background and Specific Scope of the Requirement

Since 2016 the Public Health Agency of Canada (PHAC) has been including economic analyses as part of their reviews, such as economic evaluations and systematic reviews of economic evaluations.

Current economic evaluation guidelines exist for health technologies in general. Health technologies often include drugs, medical devices, diagnostics, and procedures. Most of the methods currently under existing guidelines are applicable to vaccines, but do not discuss aspects that are unique to vaccines and the infectious diseases in which they prevent or treat. Hence, there is a need for vaccine-specific economic guidelines in Canada to support the work at NACI.

The time-limited Economic Guidelines Task Group was convened in November 2018 to address this need. The anticipated timeline of the Task Group is 18 months to 2 years. Membership was by appointment and includes 8 internationally-recognized academics with expertise in guideline development, economic theory, health economics of vaccines, mathematical modelling, child health evaluation, and global health. Two members act as Co-Chairs, one of whom also sits as a NACI member and Chair of the ETG.

The Contractor will work collaboratively with the Economic Guidelines Task Group, which is comprised of the Co-Chairs, appointed members, and NACI Secretariat. The Task Group will provide technical expertise and advice for the Contractor in drafting the text of the guidelines.

2. Requirements

2.1. Tasks, Activities, Deliverables and/or Milestones

The contractor will:

- Attend teleconferences over the anticipated timeline of the Task Group (18 months to 2 years). Additional meetings may be required as needed, in consultation with the Co-Chairs.
- Attend face-to-face Task Group meetings, which will be held once a year in Toronto or Ottawa, Ontario, Canada.
- Attend a face-to-face NACI meeting in Ottawa, Canada to present the final version of the Economic Guidelines
- Draft the Economic Guidelines for conducting and reporting economic evaluations for vaccines in Canada.
- Review existing guidelines and other publications to support the work of drafting the Economic Guidelines
- Incorporate input from PHAC, NACI, NACI Secretariat, and the Economic Guidelines Task Group as appropriate.

Phase 1: Review existing guidelines and publications

A literature review of existing guidelines on economic evaluations for vaccines/ infectious diseases is currently being planned. The NACI Secretariat has allocated resources in-house to conduct the review. However, some support from the Contractor may be required including data extraction, data synthesis, and preparation of presentation materials. The Contractor will review and familiarize themselves with existing guidelines identified from the literature review, as well as other guidance documents from various National Advisory Committees on Immunization, and methods-related publications.

The Contractor will work with Health Canada librarians and the PHAC Project Authority to keep track of documents reviewed for potential incorporation into the Economic Guidelines references.

Phase 2: Prepare ongoing drafts of the Economic Guidelines

The Contractor will prepare ongoing drafts of the Economic Guidelines for review by the Economic Guidelines Task Group. The final draft will reflect the findings from the literature search and consultations, along with the list of references. The development of the final draft will be an iterative process, with the Task Group and NACI contributing to and validating content. The Contractor will maintain a record of input received and how it was acted upon. Throughout the drafting process, the Task Group will review and provide feedback on drafts. The Contractor will need to adhere to the format and writing style of NACI documents (table of contents, reference style following Uniform Requirements (ICMJE), etc). The Contractor will present the ongoing drafts of the Economic Guidelines at teleconferences or a face-to-face meetings when requested (depending on timelines – the Task Group meets every three months via teleconference and face-to-face once a year); PowerPoint presentations, with which to walk the Task Group through the key content, will be requested as needed. The Contractor will address the Task Group's feedback on the Economic Guidelines, which may be provided verbally at the teleconference (or in writing afterwards). The final draft will be approved by the Economic Guidelines Task Group before receiving broader NACI feedback and NACI endorsement.

Phase 3: Approval of the final draft of the Economic Guidelines

The final deliverable of this project will be the completed Economic Guidelines, with appended supporting tools (e.g., templates, checklists) as appropriate, approved by the Economic Guidelines Task Group and endorsed by NACI.

For approval by the Economic Guidelines Task Group, the Contractor will present the updated draft to the Task Group using a PowerPoint presentation which outlines how all feedback was incorporated. The Contractor will address any final Task Group feedback (provided verbally at the teleconference or in writing afterwards) on the Economic Guidelines and provide a final Microsoft Word document to NACI for further feedback and endorsement.

The Economic Guidelines may be shared with other stakeholders (i.e., P/T, Canadian Immunization Committee, industry, health technology assessment networks) for feedback or for informational purposes. The Contractor will address any feedback from stakeholders. The Guidelines may be shared after NACI endorsement or throughout the guidelines development, as determined by the Task Group. The Contractor will prepare PowerPoint presentation decks for these knowledge translation and exchange activities. The Contractor will also prepare summaries such as for the Canadian Communicable Disease Report.

Project Schedule (timelines and line items are subject to change based on advice from the Task Group)

Specific due dates and timelines for each deliverable and task will be specified once the contract is awarded.

	Tasks	Responsibility	Deliverables	Duration (Total 15 months to 21 months)	Notes
Phase 1: Review existing guidelines and publications					
1.1	Review existing guidelines and publications	Contractor	#1 Data extraction and data synthesis, as required by NACI Secretariat	Within 8-12 weeks of contract award	Incorporate input from Project Authority
1.2	Track documents reviewed for potential incorporation into the Economic Guidelines references	Contractor	#2 Documentation of references reviewed	Within 8-12 weeks of contract award	Incorporate input from Project Authority
1.3	Present deliverables #1 and #2 to the Task Group for input	Contractor		Task Group teleconference + 1-2 weeks to incorporate feedback	Incorporate Task Group input in consultation with the Project Authority
Phase 2: Prepare ongoing drafts of the Economic Guidelines					
2.1	Prepare a detailed outline of Economic Guidelines along with presentation deck	Contractor	#3 Detailed outline #4 Presentation deck of outline	Within 16-20 weeks	Incorporate input from Project Authority
2.2	Present deliverables #3 and #4 to the Task Group for input	Contractor		Task Group teleconference OR Task Group face-to-face meeting	Incorporate Task Group input in consultation with the

	Tasks	Responsibility	Deliverables	Duration (Total 15 months to 21 months)	Notes
				(depending on when meetings are scheduled) + 1-2 weeks to incorporate feedback	Project Authority
2.3	Prepare first draft of Guideline chapters, along with presentation decks; draft and present chapter by chapter	Contractor	#5 Chapters of Economic Guidelines first draft #6 Presentation deck of chapters	Within 15 months of contract award	Done in consultation with Leadership Team
2.4	Present deliverables #5 and #6 as chapters become ready;	Contractor		Task Group teleconference OR Task Group face-to-face meeting (depending on when meetings are scheduled) + 2 weeks to incorporate feedback	Incorporate Task Group feedback in consultation with the Leadership Team
Phase 3: Approval of the final draft of the Economic Guidelines					
3.1	Submit completed Economics Guidelines for review along with presentation deck; Guidelines to be approved by Task Group; to be endorsed by NACI	Contractor	#7 Economic Guidelines final version [submit as Word file] #8 Presentation deck of final draft [submit as PowerPoint file]	Within 16-20 months	Incorporate input from Project Authority, Task Group, NACI, other stakeholders
3.2	Present Economic Guidelines for input and incorporate their input	Contractor		Task Group teleconference; NACI face-to-face meeting	
3.3	Prepare knowledge translation and exchange activities (i.e., presentation decks for stakeholders such as the Canadian Immunization Committee; summary in lay language;	Contractor	#9 Knowledge translation and exchange activities	Within 21 months	Incorporate input from Project Authority

	Tasks	Responsibility	Deliverables	Duration (Total 15 months to 21 months)	Notes
	Canadian Communicable Disease Report summary)				

2.2. Specifications and Standards

All deliverables must be provided electronically to the Leadership Team in English; documents and presentations should be in Microsoft Office Word and PowerPoint respectively.

2.3. Technical, Operational and Organizational Environment

The majority of the work will take place at the Contractor's location. The contractor may participate in regular meetings with the NACI and the NACI Secretariat team within the Agency by teleconference. For the annual in-person Task Group meeting, the contractor will be responsible for arranging travel to Toronto and/ or Ottawa, Ontario (Date to be determined). For the in-person NACI meeting at the end of the guidelines development process, the Lead Writer will be responsible for arranging travel to Ottawa, Ontario (Date to be determined).

2.4. Method and Source of Acceptance

The Economic Guidelines Task Group will work closely with the Contractor for all areas of work included in the contract. Teleconference meetings every two weeks with the Leadership Team (comprised of the Co-Chairs, NACI Secretariat and the Contractor) will be held to track the progress made on the project, identify any issues or challenges that have arisen, determine potential solutions or courses of action, and confirm next steps for the project. Follow-up teleconferences with PHAC can be arranged as needed to discuss expectations, answer questions, review progress, outline challenges, and determine potential solutions/courses of action.

Completion of the deliverables will be monitored by the Leadership Team via the electronic drafts submitted by the Contractor. Significant changes and revisions to the documents shall be highlighted by using the documents' review functions (i.e. track changes and comments boxes) for ease of review.

2.5. Reporting Requirements

The contractor shall report to the PHAC Project Authority once every two weeks.

2.6. Project Management Control Procedures

The individual identified in the proposal as the Project Authority shall facilitate teleconferences, consult with other PHAC employees, the NACI Secretariat, and others as required to ensure that draft and final documents are of an acceptable quality, have incorporated the necessary feedback received, contain all required elements, are done within budget, and within agreed upon time frames, as per Project Schedule (2.1 table).

It is required that the contractor notifies the Project Authority when a deliverable has been met so that the Project Authority can confirm completion, and ensure the payment schedule will be matched to the measurement of performance throughout the contract. The Project Authority is responsible to respond to all correspondence and updates from contractor within 5 working days.

3. Additional Information

3.1. Canada's Obligations

- Be available to coordinate activities;

- Provide comments on draft reports as specified in section 2.1;
- Respond to all correspondence from contractor within 5 working days of receipt;
- Provide other assistance or support as needed.
- Provide access to the departmental library, government policies and procedures, and publications and reports as required for completion of work;
- Provide access to a staff member who will be available to coordinate activities; Provide access to the Project Authority to discuss the project as needed;
- Provide access to the Project Authority to discuss content as needed;
- Provide other assistance or support, as required.

3.2. Contractor's Obligations

- Unless otherwise specified, the Contractor must use its own equipment and software for the performance of this Statement of Work.
- Arrange travel to Toronto or Ottawa, Ontario for annual in-person Task Group meeting.
- Arrange travel to Ottawa, Ontario for in-person NACI meeting at end of guidelines development process.

3.3. Location of Work, Work site and Delivery Point

The location of work will be completed outside of the Public Health Agency of Canada. Check-ins with Project Authority will be conducted via teleconference or by email; presentations to the NACI Secretariat and Economic Guidelines Task Group will take place by teleconference.

3.4. Language of Work

The work will be completed in English.

4. Project Schedule

4.1. Schedule and Estimated Level of Effort (Work Breakdown Structure)

Work will be done on an "as and when requested" basis as directed by the Project Authority.

The project schedule (section 2.1) details the requirements of each deliverable and the estimated timelines for each.

5. Applicable Documents and Glossary

5.1. Applicable Documents

- Guidelines for the economic evaluation of health technologies: Canada. 4th ed. Ottawa: CADTH; 2017 Mar.
https://www.cadth.ca/sites/default/files/pdf/guidelines_for_the_economic_evaluation_of_health_technologies_canada_4th_ed.pdf
- World Health Organization guide for standardization of economic evaluations of immunization programmes. Geneva: WHO; 2008 Dec.
https://apps.who.int/iris/bitstream/handle/10665/69981/WHO_IVB_08.14_eng.pdf;jsessionid=BE45AB3A0690AD9B7DD1CF5DA13702D4?sequence=1

ANNEX B – BASIS OF PAYMENT

The Contractor will be paid firm hourly rates as follows, for work performed in accordance with the Contract. Customs duties are excluded and Applicable Taxes are extra.

Contract Period: April 1, 2019 to March 31, 2021

RESOURCE	FIRM ALL-INCLUSIVE HOURLY RATE (A)	ESTIMATED # OF HOURS (B)	ESTIMATED TOTAL (C=AxB)
Guideline Writer	\$	Up to 3300 hours	\$

Total Estimated Cost: \$_____

Travel and Living Expenses

The Contractor will be reimbursed for the authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the meal and private vehicle allowances specified in Appendices B, C and D of the [National Joint Council Travel Directive](#), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees". Canada will not pay the Contractor any incidental expense allowance for authorized travel.

All travel must have the prior authorization of the Project Authority. All payments are subject to government audit.

Estimated cost: \$_____