



SUPPLY ARRANGEMENT (SA)

FOR

ENERGY ANALYSIS AND DATA COLLECTION SERVICES

FOR

NATURAL RESOURCES CANADA (NRCAN)

A supply arrangement (SA) allows Canada to solicit proposals from a pool of pre-qualified suppliers. A supply arrangement is not a contract for the provision of services and neither party is legally bound as a result of signing the supply arrangement document alone. The intent of a supply arrangement is to establish a framework to permit the expeditious processing of individual solicitations, which result in legally binding contracts for the services defined in individual solicitations that fall within the scope of the supply arrangement.



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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Supply Arrangements (RFSA) is divided into six parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Supplier Instructions: provides the instructions applicable to the clauses and conditions of the RFSA;

Part 3 Arrangement Preparation Instructions: provides Suppliers with instructions on how to prepare the arrangement to address the evaluation criteria specified;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria which must be addressed in the arrangement and the basis of selection;

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided; and

Part 6 6A, Supply Arrangement, 6B, Bid Solicitation, and 6C, Resulting Contract Clauses:

6A, includes the Supply Arrangement (SA) with the applicable clauses and conditions;

6B, includes the instructions for the bid solicitation process within the scope of the SA;

6C, includes general information for the conditions which will apply to any contract entered into pursuant to the SA.

Annexes include:

Annex "A" – Statement of Work

Annex "B" – Basis of Payment

Annex "C" – Security Requirements & Security Requirements Checklist

Appendices include:

Appendix "1" – Definition of Work Streams

1.2 Summary

1.2.1 By means of this Request for Supply Arrangement (RFSA), The Office of Energy Efficiency (OEE) at Natural Resources Canada (NRCan) is seeking to pre-qualify companies that can carryout data and program support activities, analysis and research, audits and strategic planning activities and technical modeling services. The Supply Arrangement has no defined end-date and will remain valid until such time as Canada no longer considers it to be advantageous to use it.



Work Streams:

- **Stream A** – Support to Strategic Planning
- **Stream B** – Program Delivery and Monitoring
- **Stream C** – Recipient and/or Financial Audits
- **Stream D** – Economic Analysis and Research
- **Stream E** – Technical Support
- **Stream F** – Program Support

Note to Bidders: Bidders can bid on all streams or any of the streams.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 1 - General Information, and Part 6A - Supply Arrangement. For more information on personnel and organization security screening or security clauses, Suppliers should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
- 1.2.3 The requirement is subject to the following trade agreements:

World Trade Organization - Agreement on Government Procurement;
North American Free Trade Agreement;
Comprehensive Economic and Trade Agreement;
Canadian Free Trade Agreement;
Canada-Chile Free Trade Agreement;
Canada-Colombia Free Trade Agreement;
Canada-Honduras Free Trade Agreement;
Canada-Panama Free Trade Agreement;
Canada-Peru Free Trade Agreement;
Canada-Korea Free Trade Agreement

1.3 Security Requirements

1. Prior to the issuance of a Supply Arrangement, the following conditions must be met:
- (a) the Supplier must hold a valid organization security clearance as indicated in Part 6A - Supply Arrangement;
 - (b) the Supplier's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6A - Supply Arrangement;
 - (c) the Supplier must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Supplier's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 6A - Supply Arrangement;
 - (e) the Supplier must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. For additional information on security requirements, Suppliers should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.



1.4 Debriefings

Suppliers may request a debriefing on the results of the request for supply arrangements process. Suppliers should make the request to the Supply Arrangement Authority within 15 working days of receipt of the results of the request for supply arrangements process. The debriefing may be in writing, by telephone or in person.



PART 2 - SUPPLIER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Supply Arrangements (RFSA) 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.

Suppliers who submit an arrangement agree to be bound by the instructions, clauses and conditions of the RFSA and accept the clauses and conditions of the Supply Arrangement and resulting contract(s).

The [2008](#) (2018-05-22) Standard Instructions - Request for Supply Arrangements - Goods or Services, are incorporated by reference into and form part of the RFSA.

Subsection 5.4 amended as follow:

Delete: 60 days

Insert: 180 days

Section 6 amended as follow:

DELETE: PWGSC

INSERT: NRCan

Subsection 8.1 amended as follow:

DELETE: In its entirety

2.1.1 SACC Manual Clauses

S0010C (2012-07-16) – Periodic Usage Reports – Supply Arrangement

2.2 Submission of Arrangements

Arrangements must be submitted only to Natural Resources Canada (NRCan) Bid Receiving Unit by the date, time and place indicated on page 1 of the Request for Supply Arrangements.

Due to the nature of the Request for Supply Arrangements, transmission of arrangements by facsimile to NRCan will not be accepted.

It is requested that the Bidder's name, return address, Request for Supply Arrangement Number and Closing Date appear legibly on the outside of the envelope containing the Bidder's proposal. Failure to do so may result in bids being misdirected. **NRCan will not assume responsibility for proposals directed to any other location.**

The onus is on the Bidder to ensure that the proposal is delivered to the location identified on Page 1. Not complying with the above instructions may result in NRCan's inability to ascertain reception date and/or consider the bid prior to supply arrangement award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.



2.3 Former Public Servant - Notification

Service contracts awarded to former public servants in receipt of a pension or a lump sum payment must bear the closest public scrutiny and reflect fairness in the spending of public funds. Therefore, the bid solicitation will require that you provide information that, were you to be the successful bidder, your status with respect to being a former public servant in receipt of a pension or a lump sum payment, will be required to report this information on the departmental websites as part of the published proactive disclosure reports generated in accordance with Treasury Board policies and directives on contracts with former public servants, [Contracting Policy Notice 2012-2](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

2.4 Federal Contractors Program for Employment Equity - Notification

The Federal Contractors Program (FCP) for employment equity requires that some contractors make a formal commitment to Employment and Social Development Canada (ESDC) - Labour to implement employment equity. In the event that this Supply Arrangement would lead to a contract subject to the Federal Contractors Program (FCP) for employment equity, the bid solicitation and resulting contract templates would include such specific requirements. Further information on the Federal Contractors Program (FCP) for employment equity can be found on [Employment and Social Development Canada \(ESDC\) - Labour's](#) website.

2.5 Enquiries - Request for Supply Arrangements

All enquiries must be submitted in writing to the Supply Arrangement Authority no later than **ten (10)** business days before the Request for Supply Arrangements (RFSA) closing date. Enquiries received after that time may not be answered.

Suppliers should reference as accurately as possible the numbered item of the RFSA to which the enquiry relates. Care should be taken by Suppliers 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 Suppliers do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Suppliers. Enquiries not submitted in a form that can be distributed to all Suppliers may not be answered by Canada.

2.6 Applicable Laws

The Supply Arrangement (SA) and any contract awarded under the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Suppliers may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of the arrangement, 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 Suppliers.



PART 3 - ARRANGEMENT PREPARATION INSTRUCTIONS

3.1 Arrangement Preparation Instructions

Note: NRCan will accept either a hard copy or an electronic copy as submitted bids. However, it is NRCan's preference that bids be submitted electronically in order for us to adhere to our Green Initiative.

No payment shall be made for costs incurred by the Bidder in the preparation and submission of a proposal in response to this RFSA.

All fees, associated with the transfer of data or of all documents as may be required by NRCan as part of the solicitation process, are the responsibility of the Bidder. No costs incurred by the Bidder before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resulting contract.

ELECTRONIC (Preferred Method):

It is the Bidders responsibility to ensure that proposals are sent to the following e-mail address, by the time and date indicated on page 1 of this RFSA document:

NRCan.pacific_region_bid_submission-pacific_region_bid_submission.RNCan@canada.ca

IMPORTANT

Write the following information in the subject line of the email:

NRCan-5000033922 - Energy Analysis and Data Collection Services

The address above is reserved for the presentation of the proposals. No other communication must be sent there.

The onus is on the Bidder to ensure that the proposal is submitted correctly to the above address. Not complying with the above instructions may result in NRCan's inability to ascertain reception date and/or to consider the bid prior to contract award. Therefore, NRCan reserves the right to reject any proposal not complying with these instructions.

Canada requests that Bidders provide their bid in separate files as follows:

- File I:** Technical Bid and page 1 completed.
- File II:** Certifications
- File III:** Additional Information

OR

HARD COPY:

Natural Resources Canada encourages the use of recycled paper and **two-sided printing**. Reduction in the size of documents will contribute to Natural Resources Canada's sustainable development initiatives and reduce waste.



In support of the Policy on Green Procurement, it is requested that bidders provide their bid in separately bound sections as follows:

Section I: Technical Bid – 4 copies (1 original, 3 copies)

Section II: Certifications – 1 copy

Section III: Additional Information - 1 copy

- a) **Format of Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid :
- i. use 8.5 x 11 inch (216 mm x 279 mm) paper;
 - ii. use a numbering system that corresponds to the bid solicitation;
 - iii. include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative; and
 - iv. Include a table of contents.

To assist Canada in reaching its objectives on Green Procurement, bidders are encouraged to:

- i. use paper containing fibre certified as originating from a sustainably-managed forest and/or containing minimum 30% recycled content; and
- ii. 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.

Technical Arrangement

In the technical arrangement, Suppliers should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work.

Certifications

Suppliers must submit the certifications required under Part 5.

Additional Information

Supplier's Proposed Sites or Premises Requiring Safeguarding Measures

As indicated in Part 1 under Security Requirements, the Supplier must provide the full addresses of the Supplier's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country



The Company Security Officer (CSO) must ensure through the [Industrial Security Program \(ISP\)](#) that the Supplier and proposed individual(s) hold a valid security clearance at the required level, as indicated in Part 1, clause 1.3, Security Requirements.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

This will be applicable for each respective stream. Each stream will be evaluated separately.

4.1 Evaluation Procedures

- (a) Arrangements will be assessed in accordance with the entire requirement of the Request for Supply Arrangements including the technical evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the arrangements.

The Mandatory Requirements listed below will be evaluated on a simple pass/fail (i.e. compliant/non-compliant) basis. Proposals which fail to meet the Mandatory Requirements will be deemed non-responsive and will be given no further consideration

Proposals MUST demonstrate compliance with all of the following Mandatory Requirements and MUST provide the necessary documentation, as appropriate, to support compliance.

The Bidder may propose one (1) or multiple resources for each category of services.

If a contract for a supply arrangement is issued, the successful Bidder will have the opportunity to add or replace resources at any time, providing that a CV identifying the skills and competencies of the resources are well documented, and are supplied to the Project Authority before the start of any project. All additional or replacement personnel will be evaluated based on the mandatory and point rated criteria of this RFSA. These criteria must be met at all times for the duration of the supply arrangement.

NOTE: For the purposes of this RFSA, the Bidder must be able to offer services in any one (1) or all of the following six (6) work streams.

- **Stream 1 ("A")** – Support to Strategic Planning
- **Stream 2 ("B")** – Program Delivery and Monitoring
- **Stream 3 ("C")** – Recipient and/or Financial Audits
- **Stream 4 ("D")** – Economic Analysis and Research
- **Stream 5 ("E")** – Technical Support
- **Stream 6 ("F")** – Program Support

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

The Bidder may propose one (1) or multiple resources. Should the Bidder wish to replace any of the proposed resources at any time after the SA has been signed, they must submit the same information provided originally for that resource. All additional or replacement personnel will be evaluated on the Mandatory and Point Rated Criteria of this RFSA. These criteria **MUST** be met at all times for the duration of the SA.



WORK STREAM A – SUPPORT TO STRATEGIC PLANNING

Item	Mandatory Requirement	Met/ Not Met	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager</u>, <u>Senior Researcher/Analyst</u>, and <u>Researcher/Analyst</u>.</p> <p>Please note: the <u>Project Manager</u> and <u>Senior Researcher/Analyst</u> may be the same individual.</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	<p>The Supplier (Bidder) must demonstrate that each individual proposed for the <u>Project Manager</u> position has a minimum of four (4) years experience since January 1, 2012 in providing project management to senior management in SUPPORT TO STRATEGIC PLANNING.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-4	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess a minimum of four (4) years of research and analytical experience related to Canadian energy studies since January 1, 2010.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-6	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess, or be in the process of obtaining, at a minimum, a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-7	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess a minimum of one (1) year of research and analytical experience related to energy studies since January 1, 2013.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link:

https://www.cicic.ca/868/search_the_directory_of_educational_institutions_in_canada.canada.



WORK STREAM B – PROGRAM DELIVERY AND MONITORING

Item	Mandatory Requirement	Met/NotMet	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager</u>, <u>Senior Researcher/Analyst</u>, and <u>Researcher/Analyst</u>.</p> <p>Please note: the <u>Project Manager</u> and <u>Senior Researcher/Analyst</u> may be the same individual.</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate from a recognized Canadian university, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	<p>The Supplier (Bidder) must demonstrate that each individual proposed for the <u>Project Manager</u> position has a minimum of four (4) years experience since January 1, 2012 in providing project management to senior management on PROGRAM DELIVERY AND MONITORING.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-4	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess, at a minimum, a post-secondary degree in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university, or the equivalent, as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Senior Researcher and Analyst</u> position must possess a minimum of four (4) years of research and analytical experience related to Canadian energy studies since January 1, 2010.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-6	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess, or be in the process of obtaining, at a minimum, a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-7	<p>Each individual proposed for the <u>Researcher/Analyst</u> position has a minimum of one (1) year of research and analytical experience since January 1, 2013.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/indexe.stm>.



WORK STREAM C – RECIPIENT AND/OR FINANCIAL AUDITS

Item	Mandatory Requirement	Met/NotMet	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager</u>, <u>Senior Researcher/Analyst</u>, and <u>Researcher/Analyst</u>.</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager</u> position must possess, at a minimum a:</p> <p>a) Professional Engineering license from an accredited engineering program association or be a member of the Ordre des ingénieurs du Québec, (visit www.peng.ca for more information) AND has a total of four (4) years experience in providing energy assessments AND participated in at least four (4) energy assessment projects since January 1, 2012.</p> <p>OR</p> <p>b) Professional Accounting designation (Chartered Accountant, Certified General Accountant or Certified Management Accountant) AND have a total of four (4) years experience in providing recipient and/or financial AUDITS AND participated in at least four (4) recipient and/or financial audit projects since January 1, 2012.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess, at a minimum a post-secondary degree, diploma or certificate in Accounting, Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-4	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess a minimum of four (4) years of research and analytical experience related to Canadian energy-consuming markets project auditing since January 1, 2012.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess, or be in the process of obtaining, at a minimum, a post-secondary degree, diploma or certificate in Accounting, Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-6	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess a minimum of one (1) year of research and analytical experience related to energy studies since January 1, 2013.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/indexe.stm>.

WORK STREAM D – ECONOMIC ANALYSIS AND RESEARCH

Item	Mandatory Requirement	Met/NotMet	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager</u>, <u>Senior Researcher/Analyst</u>, and <u>Researcher/Analyst</u>.</p> <p>Please note: the <u>Project Manager</u> and <u>Senior Researcher/Analyst</u> may be the same individual.</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager</u> position must possess, at a minimum a:</p> <p>a) post-secondary degree, diploma or certificate from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of four (4) years experience since January 1, 2012 in providing project management ECONOMIC ANALYSIS AND RESEARCH.</p> <p>OR</p> <p>b) post-secondary degree, diploma or certificate from a recognized Canadian college or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of eight (8) years experience since January 1, 2008 in providing project management ECONOMIC ANALYSIS AND RESEARCH.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university, or the equivalent, as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-4	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess a minimum of four (4) years of research and analytical experience related to Canadian energy studies since January 1, 2010.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Researcher/Analyst</u> position must possess or be in the process of obtaining, at a minimum, a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Public/Business Administration, Environmental Studies or Statistics from a recognized Canadian university or college, or the equivalent as established by</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



Item	Mandatory Requirement	Met/NotMet	Proposal Page #
	a recognized Canadian academic credentials assessment service*, if obtained outside Canada.		
M-6	Each individual proposed for the <u>Researcher/Analyst</u> position must possess a minimum of one (1) year of research and analytical experience since January 1, 2013.	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/indexe.stm>.

WORK STREAM E – TECHNICAL SUPPORT

Item	Mandatory Requirement	Met/NotMet	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager</u>, <u>Senior Technical Advisor</u>, <u>Senior Energy Simulation Software Developer/Analyst</u>, <u>Senior Researcher/Analyst</u>, and <u>Researcher/Analyst/Advisor</u>.</p> <p>Please note: - the <u>Project Manager</u>, <u>Senior Technical Advisor</u>, <u>Senior Energy Simulation Software Developer/Analyst</u> and <u>Senior Researcher/Analyst</u> may be the same individual</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager</u> position must possess, at a minimum a:</p> <p>a) post-secondary degree, diploma or certificate from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of four (4) years experience since January 1, 2012 in providing project management TECHNICAL SUPPORT and contributed to at least three (3) technical projects.</p> <p>OR</p> <p>b) post-secondary degree, diploma or certificate from a recognized Canadian college or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of eight (8) years experience since January 1, 2008 in providing project management TECHNICAL SUPPORT and contributed to at least three (3) technical projects.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	Each individual proposed for the <u>Senior Energy Simulation Software Developer/Analyst</u> position must possess, at a minimum:	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



Item	Mandatory Requirement	Met/NotMet	Proposal Page #
	<p>a) a post-secondary degree, diploma or certificate in Computer Science, Statistics, Mathematics or Engineering, from a recognized Canadian university, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>AND</p> <p>b) three (3) years of experience in developing software applications and a minimum of one (1) year of experience working with simulation tools since January 1, 2014.</p>		
M-4	<p>Each individual proposed for the Senior Technical Advisor position must possess, at a minimum:</p> <p>a) post-secondary degree, diploma or certificate from a recognized Canadian university or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of three (3) years experience since January 1, 2012 in providing project management TECHNICAL SUPPORT and contributed to at least three (3) technical projects.</p> <p>OR</p> <p>b) post-secondary degree, diploma or certificate from a recognized Canadian college or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada AND has a minimum of six (6) years experience since January 1, 2008 in providing project management TECHNICAL SUPPORT and contributed to at least three (3) technical projects.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Senior Researcher/Analyst</u> position must possess, at a minimum:</p> <p>a) a post-secondary degree, diploma or certificate in Science, Engineering, Mathematics, Statistics or Environmental Studies from a recognized Canadian university, or the equivalent, as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>AND</p> <p>b) four (4) years of research and analytical experience related to technical energy studies and, participated in at least two (2) technical energy projects since January 1, 2012.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-6	<p>Each individual proposed for the <u>Researcher/Analyst/Advisor</u> position must possess or be in the process of obtaining, at a minimum:</p> <p>a) a post-secondary degree, diploma or certificate in Science, Engineering, Economics, Mathematics, Statistics or Environmental Studies from a</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	



Item	Mandatory Requirement	Met/NotMet	Proposal Page #
	<p>recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>AND</p> <p>b) one (1) year of research and analytical experience and, participated in at least one (1) technical energy project since January 1, 2015.</p>		

* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/indexe.stm>.

WORK STREAM F – PROGRAM SUPPORT

Item	Mandatory Requirement	Met/NotMet	Proposal Page #
M-1	<p>The Supplier (Bidder) must provide the services of qualified individuals for the roles of <u>Project Manager/Facilitator</u> and <u>Analyst</u>.</p> <p>In order for the proposed resources to be evaluated properly, the Supplier (Bidder) should provide Curriculum Vitae (CV) of proposed resources that will participate in the supply arrangement and identify the role of each team member.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-2	<p>Each individual proposed for the <u>Project Manager/Facilitator</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-3	<p>The Supplier (Bidder) must demonstrate that each individual proposed for the <u>Project Manager/Facilitator</u> position has completed a minimum of ten (10) technical-related curricula development and training session delivery and consultation projects within the past ten (10) years.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-4	<p>Each individual proposed for the <u>Analyst</u> position must possess, at a minimum, a post-secondary degree, diploma or certificate from a recognized Canadian university, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	
M-5	<p>Each individual proposed for the <u>Analyst</u> position must have assisted in the co-delivery of five (5) technical-related workshops/consultations within the past five (5) years.</p>	<input type="checkbox"/> Met <input type="checkbox"/> Not met	

* The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <http://www.cicic.ca/indexe.stm>.

4.1.1.2 Point Rated Technical Criteria



The criteria contained herein will be used to evaluate each Proposal that has met **all** of the Mandatory Requirements. Bidders are advised to address these requirements in the following order and in sufficient depth in their proposals to enable a thorough assessment. The assessment will be based solely on the information contained within the Proposal. NRCan may confirm information or seek clarification from Bidders.

Only those Proposals which are compliant with all of the Mandatory Requirements and then achieve (or exceed) the stated Minimum Points Required for the Rated Requirements Evaluation Criteria Section, will be further considered for award of a Supply Arrangement. Proposals not meeting the Minimum Points Required will be deemed non-responsive and given no further consideration.

WORK STREAM A – SUPPORT TO STRATEGIC PLANNING

Points Breakdown Summary:

Rated Requirement		Points Breakdown
R1	Approach to providing SUPPORT TO STRATEGIC PLANNING	30 points
R2	Experience providing SUPPORT TO STRATEGIC PLANNING	20 points
R3	Experience of Proposed Resources	58 points (Total of R3A to C)
R3A	M-2 and M-3 of WORK STREAM A - Providing Project Management Services to Senior Management in the area of SUPPORT TO STRATEGIC PLANNING	24 points
R3B	M-4 and M-5 of WORK STREAM A - Providing Research and Analytical Services to Project Authorities Relating to Canadian Energy-Consuming Markets	24 points
R3C	M-6 and M-7 of WORK STREAM A - Providing Research and Analytical Services Relating to Energy Studies	10 points

Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing SUPPORT TO STRATEGIC PLANNING			
	As per M-1 of WORK STREAM A , the Supplier (Bidder) should describe how the proposed resources will provide SUPPORT TO STRATEGIC PLANNING services to NRCan, and demonstrate their ability to perform the TASKS for which they are submitting a bid (proposal) related to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work. The description of the approach should include examples of	Poor: 10/30 Acceptable: 18/30 Good: 23/30 Excellent: 30/30	Total: ___/30	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work.			
R2	Experience providing SUPPORT TO STRATEGIC PLANNING			
	<p>As per M-1 of WORK STREAM A, the Supplier (Bidder) should demonstrate that the Project Team possesses the experience required to perform the TASKS for which a bid (proposal) is submitted in relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to SUPPORT TO STRATEGIC PLANNING.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p> <p>This experience shall be evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work.</p> <p>b) relevance of tasks and services for all projects listed in a)</p> <p>c) number of relevant projects listed in a) supported by the Project Team and completed for the Federal Government</p>	<p>a) 1 point per relevant project supported by Project Team; maximum 5 points</p> <p>b) Relevance of tasks and services for all projects listed in a): - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10</p> <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>a) ___/5 b) ___/10 c) ___/5</p> <p>Total: ___/20</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R3	Experience of Proposed Resources:			
	<p><u>Experience of proposed resource(s)</u> As per the information provided in M-1 to M-7 of WORK STREAM A, the resources proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3C) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3C). The details should demonstrate how the proposed resources obtained the relevant experience and should include the following: a) duration of time (e.g. months, years) and dates b) the role and responsibilities c) description of work: nature, scope and objective of project(s)</p> <p>Note: the same individual can be proposed for the <u>Project Manager and Senior Researcher/Analyst</u>.</p>			
R3A	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-2 and M-3 of WORK STREAM A provided project management services to senior management in the area of SUPPORT TO STRATEGIC PLANNING. These services include, but are not limited to the TASKS listed ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource. The response should:</p> <p>a) Clearly demonstrate that</p>	<p>a) 2 points per project supported by the proposed resource during last 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by the proposed resource per project supported; up to 5 points per project, maximum 10 points: - poor: 2/5 - acceptable: 3/5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>the proposed resource has the experience as outlined in this point-rated requirement for at least two (2) projects during the last four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>- good: 4/5 - excellent: 5/5</p> <p>c) Description of projects: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>		
R3B	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-4 and M-5 of WORK STREAM A provided research and analytical services to project authorities related to Canadian Energy-Consuming Markets. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>The response should:</p> <p>a) Clearly demonstrate that the proposed resource has the experience as outlined in this point-rated requirement for at least two (2) projects during the last four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>a) 2 points per project supported by the proposed resource(s) during last 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by the proposed resource(s) per project supported; up to 5 points per project, maximum 10 points: - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of projects: nature, scope and objective of projects; up to 5 points per project, maximum 10 points - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	
R3C	The Supplier (Bidder) should	4 points: one year of		



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>demonstrate that the proposed resource(s) for M-6 and M-7 of WORK STREAM A provided research and analytical services related to energy studies. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>The response should:</p> <p>a) Demonstrate that the proposed resource has the experience as outlined in this point-rated requirement by providing a clear description of his/her roles and responsibilities.</p>	<p>research and analytical services and a poor description of work experience.</p> <p>6 points: one year of research and analytical services and an acceptable description of work experience (including nature, scope and objectives).</p> <p>8 points: one to two years of research and analytical services related to <u>energy studies</u> and a good description of work experience (including nature, scope and objectives).</p> <p>10 points: over two years of research and analytical services related to <u>energy studies</u> and an excellent description of work experience (including nature, scope and objectives).</p>	<p>Total: ___/10</p>	
Total Points Available			108	
Minimum Points Needed to be Considered Compliant (60%)			65	

Detailed Evaluation Grid:

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.



Acceptable	Clear (but not accompanied with many details) with adequate level of details demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

WORK STREAM B – PROGRAM DELIVERY AND MONITORING

Points Breakdown Summary:

Rated Requirement		Points Breakdown
R1	Approach to providing PROGRAM DELIVERY AND MONITORING	30 points
R2	Experience providing PROGRAM DELIVERY AND MONITORING	20 points
R3	Experience of Proposed Resources	58 points (Total of R3A to C)
R3A	M-2 and M-3 of Work Stream B - Providing Project Management Services to Senior Management in the area of PROGRAM DELIVERY AND MONITORING	24 points
R3B	M-4 and M-5 of Work Stream B - Providing Research and Analytical Services to Project Authorities Related to Canadian Energy-Consuming Markets	24 points
R3C	M-6 and M-7 of Work Stream B - Providing Research and Analytical Services related to Energy Studies	10 points

Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing PROGRAM DELIVERY AND MONITORING			
	As per M-1 of WORK STREAM B , the Supplier (Bidder) should describe how the proposed resources will provide PROGRAM DELIVERY AND MONITORING services to NRCan, and demonstrate their ability to perform the TASKS for which they are submitting a bid (proposal), related to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.	Poor: 10/30 Acceptable: 18/30 Good: 23/30 Excellent: 30/30	Total: ___/30	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>The description of the approach should include examples of actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work.</p>			
R2	Experience providing PROGRAM DELIVERY AND MONITORING			
	<p>As per M-1 of WORK STREAM B, the Supplier (Bidder) should demonstrate that the Project Team possesses the experience required to perform the TASKS for which a bid (proposal) is submitted in relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to PROGRAM DELIVERY AND MONITORING.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p> <p>This experience shall be evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work. b) relevance of tasks and services for all projects listed in a) c) number of relevant projects</p>	<p>a) 1 point per relevant project supported by Project Team; maximum 5 points</p> <p>b) Relevance of tasks and services for all projects listed in a): - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10</p> <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>a) ___/5 b) ___/10 c) ___/5</p> <p>Total: ___/20</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	listed in a) supported by the Project Team and completed for the Federal Government			
R3	Experience of Proposed Resource(s):			
	<p><u>Experience of proposed resource(s)</u> As per the information provided in M-1 to M-7 of WORK STREAM B, the resource(s) proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3C) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3C). The details should demonstrate how the proposed resource(s) obtained the relevant experience and should include the following: a) duration of time (e.g. months, years) and dates b) the role and responsibilities c) description of work: nature, scope and objective of project(s)</p> <p>Note: the same individual can be proposed for the <u>Project Manager</u> and <u>Senior Researcher/Analyst</u>.</p>			
R3A	The Supplier (Bidder) should demonstrate that the proposed resource for M-2 and M-3 of WORK STREAM B provided project management services to senior management in the area of PROGRAM DELIVERY AND MONITORING . These services include, but are not limited to the TASKS listed ANNEX A of the Statement of	<p>a) 2 points per project supported by the proposed resource during last 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by the</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least two (2) projects during the last four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>proposed resource per project supported; up to 5 points per project, maximum 10 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>		
R3B	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-4 and M-5 of WORK STREAM B provided research and analytical services to project authorities related to Canadian Energy-Consuming Markets. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource(s) should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least two (2) projects during the last four (4) years.</p> <p>b) Provide a clear description of his/her roles and</p>	<p>a) 2 points per project supported by proposed resource(s) during last 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 10 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5</p> <p>- acceptable: 3/5</p> <p>- good: 4/5</p> <p>- excellent: 5/5</p>		
R3C	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-6 and M-7 of WORK STREAM B provided research and analytical services related to energy studies. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement by providing a clear description of his/her roles and responsibilities.</p>	<p>4 points: one year of research and analytical services and a poor description of work experience.</p> <p>6 points: one year of research and analytical services and an acceptable description of work experience (including nature, scope and objectives).</p> <p>8 points: one to two years of research and analytical services related to <u>energy studies</u> and a good description of work experience (including nature, scope and objectives).</p> <p>10 points: over two years of research and analytical services related to <u>energy studies</u> and an</p>	<p>Total: ____/10</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
		excellent description of work experience (including nature, scope and objectives).		
Total Points Available			108	
Minimum Points Needed to be Considered Compliant (60%)			65	

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.
Acceptable	Clear (but not accompanied with many details) with adequate level of details demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

WORK STREAM C – RECIPIENT AND/OR FINANCIAL AUDITS

Points Breakdown Summary:

Rated Requirement		Points Breakdown
R1	Approach to providing RECIPIENT and/or FINANCIAL AUDITS	30 points
R2	Experience providing RECIPIENT and/or FINANCIAL AUDITS	20 points
R3	Experience of Proposed Resource(s)	58 points (Total of R3A to C)
R3A	M-2 of WORK STREAM C - Providing Project Management Services to Senior Management in the Area of <u>Energy Assessments</u>	24 points
R3B	M-3 and M-4 of WORK STREAM C - Providing Relevant Services to Project Authorities Related to Canadian Energy-Consuming Markets	24 points
R3C	M-5 and M-6 of WORK STREAM C - Providing Research and Analytical Services Related to Energy Studies	10 points



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing SUPPORT TO RECIPIENT and/or FINANCIAL AUDITS			
	<p>As per M-1 to M-6 of WORK STREAM C, the Supplier (Bidder) should describe how the proposed resources will provide SUPPORT TO RECIPIENT and/or FINANCIAL AUDITS services to NRCan, and demonstrate their ability to perform the TASKS for which they are submitting a bid (proposal), related to any of the ECONOMIC ACTIVITIES listed in ANNEX A of the Statement of Work.</p> <p>The description of the approach should include examples of actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work..</p>	<p>Poor: 10/30</p> <p>Acceptable: 18/30</p> <p>Good: 23/30</p> <p>Excellent: 30/30</p>	<p>Total: ___/30</p>	
R2	Experience providing RECIPIENT and/or FINANCIAL AUDITS			
	<p>As per M-1 of WORK STREAM C, the Supplier (Bidder) should demonstrate that the Project Team possesses the relevant experience required to perform the TASKS for which a bid (proposal) is submitted in relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to RECIPIENT and/or FINANCIAL AUDITS.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>a) 1 point per relevant project supported by Project Team; maximum 5 points</p> <p>b) Relevance of tasks and services for all projects listed in a): - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10</p> <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>a) ___/5 b) ___/10 c) ___/5</p> <p>Total: ___/20</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>This experience shall be evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work.</p> <p>b) relevance of tasks and services for all projects listed in a)</p> <p>c) number of relevant projects listed in a) supported by the Project Team and completed for the Federal Government</p>			
R3	Experience of Proposed Resource(s):			
	<p>As per the information provided in M-1 to M-6 of WORK STREAM C, the resource(s) proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3C) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3C). The details should demonstrate how the proposed resource(s) obtained the experience and should include the following:</p> <p>a) duration of time (e.g. months, years) and dates</p> <p>b) the role and responsibilities</p> <p>c) dollar value of projects or budgets of work: nature, scope and objective of project(s)</p>			
R3A	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-2 of WORK STREAM C provided project management services to senior</p>	<p>a) 1 point per project supported by proposed resource during last 6 years, maximum 4 points</p>	<p>a) ___/4 b) ___/10 c) ___/10</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>management in the area of <u>energy assessments OR financial audits</u>. These services include, but are not limited to the TASKS listed in ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least four (4) projects during the last six (6) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>b) Relevance of roles and responsibilities provided by proposed resource per project supported; up to 2.5 points per project, maximum 10 points: - poor: 1/2.5 - acceptable: 1.5/2.5 - good: 2/2.5 - excellent: 2.5/2.5</p> <p>c) Description of work: nature, scope and objective of projects; up to 2.5 points per project, maximum 10 points: - poor: 1/2.5 - acceptable: 1.5/2.5 - good: 2/2.5 - excellent: 2.5/2.5</p>	<p>Total: ___/24</p>	
R3B	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-3 and M-4 of WORK STREAM C provided relevant services to project authorities related to Canadian energy-consuming markets project auditing. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he</p>	<p>a) 1 point per project supported by proposed resource(s) during last 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 2.5 points per project, maximum 10 points: - poor: 1/2.5 - acceptable: 1.5/2.5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>has the experience as outlined in this point-rated requirement for at least four (4) projects during the last four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>- good: 2/2.5 - excellent: 2.5/2.5</p> <p>c) Description of work: nature, scope and objective of projects; up to 2.5 points per project, maximum 10 points:</p> <p>- poor: 1/2.5 - acceptable: 1.5/2.5 - good: 2/2.5 - excellent: 2.5/2.5</p>		
R3C	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-5 and M-6 of WORK STREAM C provided research and analytical services related to energy studies. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement by providing a clear description of his/her roles and responsibilities.</p>	<p>4 points: one year of research and analytical services and a poor description of work experience.</p> <p>6 points: one year of research and analytical services and an acceptable description of work experience (including nature, scope and objectives).</p> <p>8 points: one to two years of research and analytical services related to <u>energy studies</u> and a good description of work experience (including nature, scope and objectives).</p> <p>10 points: over two years of research and analytical</p>	<p>Total: ____/10</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
		services related to <u>energy studies</u> and an excellent description of work experience (including nature, scope and objectives).		
Total Points Available			108	
Minimum Points Needed to be Considered Compliant (60%)			65	

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.
Acceptable	Clear (but not accompanied with many details) with adequate level of details demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

WORK STREAM D – ECONOMIC ANALYSIS AND RESEARCH

Points Breakdown Summary:

	Rated Requirement	Points Breakdown
R1	Approach to Providing ECONOMIC ANALYSIS AND RESEARCH	30 points
R2	Experience Providing ECONOMIC ANALYSIS AND RESEARCH	20 points
R3	Experience of Proposed Resource(s)	58 points (Total of R3A to C)
R3A	M-2 of WORK STREAM D - Providing Project Management Services to Senior Management in the Area of ECONOMIC ANALYSIS AND RESEARCH	24 points
R3B	M-3 and M-4 of WORK STREAM D - Providing Research and Analytical Services to Project Authorities Related to Canadian Energy-Consuming Markets	24 points
R3C	M-5 and M-6 of WORK STREAM D - Providing Research and Analytical Services Related to Energy Studies	10 points



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing ECONOMIC ANALYSIS AND RESEARCH			
	<p>As per M-1 of WORK STREAM D, the Supplier (Bidder) should describe how the proposed resources will provide ECONOMIC ANALYSIS AND RESEARCH services to NRCan, and demonstrate their ability to perform TASKS for which they are submitting a bid (proposal), related to any of the ECONOMIC ACTIVITIES listed in ANNEX A of the Statement of Work.</p> <p>The description of the approach should include examples of actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work.</p>	<p>Poor: 10/30</p> <p>Acceptable: 18/30</p> <p>Good: 23/30</p> <p>Excellent: 30/30</p>	<p>Total: ___/30</p>	
R2	Experience providing ECONOMIC ANALYSIS AND RESEARCH			
	<p>As per M-1 of WORK STREAM D, the Supplier (Bidder) should demonstrate that the Project Team possesses the relevant experience required to perform the TASKS for which a bid (proposal) is submitted in relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to ECONOMIC ANALYSIS AND RESEARCH.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>a) 1 point per relevant project supported by Project Team; maximum 5 points</p> <p>b) Relevance of tasks and services for all projects listed in a): - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10</p> <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>a) ___/5 b) ___/10 c) ___/5</p> <p>Total: ___/20</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>This experience shall be evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work.</p> <p>b) relevance of tasks and services for all projects listed in a)</p> <p>c) number of relevant projects listed in a) supported by the Project Team and completed for the Federal Government</p>			
R3	Experience of Proposed Resource(s):			
	<p>As per the information provided in M-1 to M-6 of WORK STREAM D, the resource(s) proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3C) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3C). The details should demonstrate how the proposed resource(s) obtained the experience and should include the following:</p> <p>a) duration of time (e.g. months, years) and dates</p> <p>b) the role and responsibilities</p> <p>c) description of work: nature, scope and objective of project(s)</p> <p>Note: the same individual can be proposed for the <u>Project Manager</u> and <u>Senior Researcher/Analyst</u>.</p>			
R3A	The Supplier (Bidder) should demonstrate that the proposed	a) 2 points per project supported by		



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>resource for M-2 of WORK STREAM D provided project management services to senior management in the area of ECONOMIC ANALYSIS AND RESEARCH. These services include, but are not limited to the TASKS listed ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least two (2) projects during the past four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>proposed resource(s) during the past 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 10 points: - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	
R3B	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-3 and M-4 of WORK STREAM D has provided research and analytical services to project authorities related to Canadian energy-consuming markets. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the</p>	<p>a) 2 points per project supported by proposed resource(s) during the past 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least two (2) projects during the past four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p>	<p>points per project, maximum 10 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>		
R3C	<p>The Supplier (Bidder) should demonstrate that the proposed resource for M-5 and M-6 of WORK STREAM D provided research and analytical services related to energy studies. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement by providing a clear description of his/her roles and responsibilities.</p>	<p>4 points: one year of research and analytical services and a poor description of work experience.</p> <p>6 points: one year of research and analytical services and an acceptable description of work experience (including nature, scope and objectives).</p> <p>8 points: one to two years of research and analytical services related to <u>energy studies</u> and a good description of work experience (including nature, scope and objectives).</p> <p>10 points: over two years of research</p>	<p>Total: ___/10</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
		and analytical services related to <u>energy studies</u> and an excellent description of work experience (including nature, scope and objectives).		
Total Points Available			108	
Minimum Points Needed to be Considered Compliant (60%)			65	

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.
Acceptable	Clear (but not accompanied with many details) with adequate level of details demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

WORK STREAM E – TECHNICAL SUPPORT

Points Breakdown Summary:

Rated Requirement		Points Breakdown
R1	Approach to providing TECHNICAL SUPPORT	30 points
R2	Experience providing TECHNICAL SUPPORT	20 points
R3	Experience of Proposed Resource(s)	130 points (Total of R3A to E)
R3A	M-2 of WORK STREAM E - Providing Project Management Services to Senior Management in the area of TECHNICAL SUPPORT	36 points
R3B	M-3 of WORK STREAM E - Providing Expertise in Developing Software Applications (Using Software Programs such as C, C++, etc.) and Working with Energy-Related Simulation Tools (i.e. DOE-2, E+ or HOT2000, etc.)	24 points
R3C	M-4 of WORK STREAM E - Providing technical advice to senior management in the area of TECHNICAL SUPPORT	36 points
R3D	M-5 of WORK STREAM E - Providing Research and Analytical Services to Project Authorities Related to Canadian Energy-Consuming Markets	24 points
R3E	M-6 of WORK STREAM E - Providing Research and Analytical Services Related to Energy Studies	10 points



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing TECHNICAL SUPPORT			
	<p>As per M-1 of WORK STREAM E, the Supplier (Bidder) should describe how the proposed resources will provide TECHNICAL SUPPORT services to NRCan, and demonstrate their ability to perform TASKS for which they are submitting a bid (proposal), related to any of the ECONOMIC ACTIVITIES listed in ANNEX A of the Statement of Work.</p> <p>The description of the approach should include examples of actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work.</p>	<p>Poor: 10/30</p> <p>Acceptable: 18/30</p> <p>Good: 23/30</p> <p>Excellent: 30/30</p>	<p>Total: ___/30</p>	
R2	Experience providing TECHNICAL SUPPORT			
	<p>As per M-1 of WORK STREAM E, the Supplier (Bidder) should demonstrate that the Project Team possesses the relevant experience required to perform TASKS for which a bid (proposal) is submitted in relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to TECHNICAL SUPPORT.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p> <p>This experience shall be</p>	<p>a) 1 point per relevant project supported by Project Team; maximum 5 points</p> <p>b) Relevance of tasks and services for all projects listed in a): - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10</p> <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>a) ___/5 b) ___/10 c) ___/5</p> <p>Total: ___/20</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work.</p> <p>b) relevance of tasks and services for all projects listed in a)</p> <p>c) number of relevant projects listed in a) supported by the Project Team and completed for the Federal Government</p>			
R3	<p>Experience of Proposed Resource(s):</p> <p>As per the information provided in M-1 to M-6 of WORK STREAM E, the resource(s) proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3E) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3E). The details should demonstrate how the proposed resource(s) obtained the experience and should include the following:</p> <p>a) duration of time (e.g. months, years) and dates</p> <p>b) the role and responsibilities</p> <p>c) description of work: nature, scope and objective of project(s)</p> <p>Notes:</p> <p>- The <u>Project Manager</u>, <u>Senior Technical Advisor</u>, <u>Senior Energy Simulation Software</u></p>			



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p><u>Developer/Analyst and Senior Researcher/Analyst</u> may be the same individual.</p>			
<p>R3A</p>	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-2 of WORK STREAM E provided project management services to senior management in the area of TECHNICAL SUPPORT. These services include, but are not limited to the TASKS listed ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least three (3) technical projects.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>a) 2 points per project supported by proposed resource(s), maximum 6 points.</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 15 points: - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 15 points - poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>	<p>a) ___/6 b) ___/15 c) ___/15</p> <p>Total: ___/36</p>	
<p>R3B</p>	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-3 of WORK STREAM E provided expertise in developing software applications (using software programs such as C, C++, etc.) and working with energy-related simulation tools</p>	<p>a) 2 points per project supported by proposed resource(s) during the past 4 years, maximum 4 points</p> <p>b) Relevance of roles</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>(i.e. DOE-2, E+ or HOT2000, etc.). Please list such software applications and simulation tools. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate that the proposed resource has the experience as outlined in this point-rated requirement for at least two (2) technical projects during the past four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 10 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>		
R3C	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-4 of WORK STREAM E provided technical advice to senior management in the area of TECHNICAL SUPPORT. These services include, but are not limited to the TASKS listed in ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate s/he has the experience as outlined in</p>	<p>a) 2 points per project supported by proposed resource(s), maximum 6 points.</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 15 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>	<p>a) ___/6 b) ___/15 c) ___/15</p> <p>Total: ___/36</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>this point-rated requirement for at least three (3) technical projects.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p>	<p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 15 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>		
<p>R3D</p>	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-5 of WORK STREAM E has provided research and analytical services to project authorities related to Canadian Energy-Consuming Markets. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should:</p> <p>a) Clearly demonstrate that the proposed resource has the experience as outlined in this point-rated requirement for at least two (2) technical energy projects during the past four (4) years.</p> <p>b) Provide a clear description of his/her roles and responsibilities on each project.</p> <p>c) Provide a clear and concise description of each project as a whole.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p>	<p>a) 2 points per project supported by proposed resource(s) during the past 4 years, maximum 4 points</p> <p>b) Relevance of roles and responsibilities provided by proposed resource(s) per project supported; up to 5 points per project, maximum 10 points:</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p> <p>c) Description of work: nature, scope and objective of projects; up to 5 points per project, maximum 10 points</p> <p>- poor: 2/5 - acceptable: 3/5 - good: 4/5 - excellent: 5/5</p>	<p>a) ___/4 b) ___/10 c) ___/10</p> <p>Total: ___/24</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
R3E	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-6 of WORK STREAM E provided research and analytical services related to energy studies. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement by providing a clear description of his/her roles and responsibilities.</p>	<p>4 points: one year of research and analytical services and a poor description of work experience.</p> <p>6 points: one year of research and analytical services and an acceptable description of work experience (including nature, scope and objectives).</p> <p>8 points: one to two years of research and analytical services related to energy studies and a good description of work experience (including nature, scope and objectives).</p> <p>10 points: over two years of research and analytical services related to energy studies and an excellent description of work experience (including nature, scope and objectives).</p>	<p>Total: ___/10</p>	
Total Points Available			180	
Minimum Points Needed to be Considered Compliant (60%)			108	

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.
Acceptable	Clear (but not accompanied with many details) with adequate level of details



	demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

WORK STREAM F – PROGRAM SUPPORT

Points Breakdown Summary:

Rated Requirement		Points Breakdown
R1	Approach to providing PROGRAM SUPPORT	30 points
R2	Experience providing PROGRAM SUPPORT	20 points
R3	Experience of proposed resource(s)	75 points (Total of R3A-B)
R3A	M-2 and M-3 (Project Management Services)	50 points
R3B	M-4 and M-5 (Research and Analytical Services)	25 points

Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder’s proposal and/or CV. Clearly identify where information can be found
R1	Approach to providing PROGRAM SUPPORT			
	As per M-1 of WORK STREAM F , the Supplier (Bidder) should describe how the proposed resources will provide PROGRAM SUPPORT services to NRCan, and demonstrate their ability to perform TASKS for which they are submitting a bid (proposal), related to any of the ECONOMIC ACTIVITIES listed in ANNEX A of the Statement of Work. The description of the approach should include examples of actions and/or activities that demonstrate that the Supplier (Bidder) clearly understands the scope of the TASKS required in ANNEX A of the Statement of Work.	Poor: 10/30 Acceptable: 18/30 Good: 23/30 Excellent: 30/30	Total: ___/30	
R2	Experience providing PROGRAM SUPPORT			
	As per M-1 of WORK STREAM F , the Supplier (Bidder) should demonstrate that the Project Team possesses the relevant experience required to perform the TASKS for which a bid (proposal) is submitted in	a) 1 point per relevant project supported by Project Team; maximum 5 points	a) ___/5 b) ___/10 c) ___/5	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>relation to any of the ECONOMIC ACTIVITIES as listed in ANNEX A of the Statement of Work.</p> <p>The Supplier (Bidder) must provide a minimum of two (2) references per project, which can be contacted to verify the accuracy and veracity of each of the projects cited as it relates to PROGRAM SUPPORT.</p> <p>NOTE: Only the first five (5) projects will be evaluated.</p> <p>This experience shall be evaluated based on:</p> <p>a) the number of clearly detailed projects that prove that the Supplier (Bidder)'s experience meet the requirements to perform the tasks listed in ANNEX A of the Statement of Work.</p> <p>b) relevance of tasks and services for all projects listed in a)</p> <p>c) number of relevant projects listed in a) supported by the Project Team and completed for the Federal Government</p>	<p>b) Relevance of tasks and services for all projects listed in a):</p> <ul style="list-style-type: none"> - poor: 3/10 - acceptable: 6/10 - good: 8/10 - excellent: 10/10 <p>c) 1 point per relevant project listed in a) supported by the Project Team and completed for the Federal Government; maximum 5 points</p>	<p>Total: ____/20</p>	
R3	Experience of Proposed Resources:			
	<p>As per the information provided in M-1 to M-4 of WORK STREAM F, the resource(s) proposed by the Supplier (Bidder) will be evaluated based on the point rated requirement (R-3A to R-3B) listed below. Each resource will be evaluated separately.</p> <p>The CVs should address all relevant details for each point-rated requirement (R-3A to R-3B). The details should demonstrate how the proposed</p>			



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>resource(s) obtained the experience and should include the following:</p> <p>a) duration of time (e.g. months, years) and dates</p> <p>b) the role and responsibilities</p> <p>c) description of work: nature, scope and objective of project(s)</p>			
R3A	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-2 and M-3 of WORK STREAM F provided project management and facilitation services to senior management in the area of PROGRAM SUPPORT. These services include, but are not limited to the TASKS listed in ANNEX A of the Statement of Work. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p> <p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least ten (10) projects during the last ten (10) years, and provide a clear description of his/her roles and responsibilities.</p> <p>NOTE: Only the first fifteen (15) projects will be evaluated.</p>	<p>a) 1 point per project supported by the proposed resource(s) during last 10 years, maximum 10 points</p> <p>b) Relevance of roles and responsibilities provided by the proposed resource(s) per project supported; up to 2 points per project, maximum 20 points: - poor: 0.5/2 - acceptable: 1/2 - good: 1.5/2 - excellent: 2/2</p> <p>c) Description of work: nature, scope and objective of projects; up to 2 points per project, maximum 20 points - poor: 0.5/2 - acceptable: 1/2 - good: 1.5/2 - excellent: 2/2</p>	<p>a) ___/10 b) ___/20 c) ___/20</p> <p>Total: ___/50</p>	
R3B	<p>The Supplier (Bidder) should demonstrate that the proposed resource(s) for M-4 and M-5 of WORK STREAM F provided co-delivery services to project authorities related to PROGRAM SUPPORT. Please refer to SW4 of the Statement of Work to view roles and responsibilities for this resource.</p>	<p>a) 1 point per project supported by the proposed resource(s) during last 5 years; maximum 5 points</p> <p>b) Relevance of roles and responsibilities provided by the proposed resource(s)</p>	<p>a) ___/5 b) ___/10 c) ___/10</p> <p>Total: ___/25</p>	



Item	Point Rated Requirement	Points Breakdown	Max Points	Cross reference to Bidder's proposal and/or CV. Clearly identify where information can be found
	<p>In order to get full points, the proposed resource should clearly demonstrate s/he has the experience as outlined in this point-rated requirement for at least five (5) projects during the last five (5) years, and provide a clear description of his/her roles and responsibilities.</p> <p>NOTE: Only the first ten (10) projects will be evaluated.</p>	<p>per project supported; up to 2 points per project, maximum 10 points:</p> <ul style="list-style-type: none"> - poor: 0.5/2 - acceptable: 1/2 - good: 1.5/2 - excellent: 2/2 <p>c) Description of work: nature, scope and objective of projects; up to 2 points per project, maximum 10 points</p> <ul style="list-style-type: none"> - poor: 0.5/2 - acceptable: 1/2 - good: 1.5/2 - excellent: 2/2 		
Total Points Available			125	
Minimum Points Needed to be Considered Compliant (60%)			75	

Excellent	Clear, thorough, very rigorous and detailed with extensive level of details demonstrating an in-depth understanding.
Good	Clear and detailed with considerable level details demonstrating a good understanding.
Acceptable	Clear (but not accompanied with many details) with adequate level of details demonstrating an acceptable understanding.
Poor	Unclear, with few details demonstrating a poor understanding.

4.2 Basis of Selection

Supply Arrangements (SA) will be issued to Suppliers who meet all of the Mandatory Requirements and achieve the minimum score identified in the Point Rated Requirements. These Bidders will be deemed to be qualified firms for the purposes of performing the services.

Receipt of a Supply Arrangement does **NOT** automatically mean that the Supplier will receive subsequent Contracts. RFPs will be sent to successful suppliers as and when required by NRCan and its federal clients.

Minimum Point Rating

1. To be declared responsive, an arrangement must:
 - a. comply with all the requirements of the Request for Supply Arrangements; and



- b. meet all mandatory technical evaluation criteria; and
 - c. obtain the required minimum of **sixty (60)** percent overall of the points for the technical evaluation criteria which are subject to a point rating.
2. Arrangements not meeting (a), (b) or (c) above will be declared non-responsive.

Note: This will be applicable for each respective stream.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Suppliers must provide the required certifications and additional information to be issued a supply arrangement (SA).

The certifications provided by Suppliers to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an arrangement non-responsive, or will declare a contractor in default if any certification made by the Supplier is found to be untrue whether made knowingly or unknowingly during the arrangement evaluation period, or during the period of any supply arrangement arising from this RFSA and any resulting contracts.

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

5.1 Certifications Required with the Arrangement

Suppliers must submit the following duly completed certifications as part of their arrangement.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all suppliers must provide with their arrangement, **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 Additional Certifications Required with the Arrangement

5.2.1 Integrity Provisions – List of Names

In accordance with 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 with its bid the required documentation, as applicable, to be given further consideration in the procurement process.

- Bidders who are incorporated, including those bidding as a joint venture, must provide a complete list of names of all individuals who are currently directors of the Bidder or, in the case of a private company, the owners of the company.
- Bidders bidding as sole proprietorship, as well as those bidding as a joint venture, must provide the name of the owner(s).



- Bidders bidding as partnerships do not need to provide lists of names.

Name of Bidder: _____

OR

Name of each member of the joint venture:

Member 1: _____

Member 2: _____

Member 3: _____

Member 4: _____

Identification of the administrators/owners:

SURNAME	NAME	TITLE

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.

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.

5.3 Certifications Precedent to the Issuance of a Supply Arrangement and Additional Information

5.3.1 Status and Availability of Resources



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

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

5.3.2 Rate or Price Certification

The Bidder certifies that the price proposed is not in excess of the lowest price charged anyone else, including the Bidder's most favoured customer, for the like quality and quantity of the goods, services or both.

5.3.3 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.

5.3.4 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**" means a 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 and includes:

- (a) An individual;
- (b) An individual who has incorporated;
- (c) A partnership made up of former public servants; or
- (d) 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 Public Service.

"**Pension**" means, in the context of the fee abatement formula, 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 (FPS) in Receipt of a Pension

Is the Bidder a FPS in receipt of a pension as defined above? **YES ()** **NO ()**

If so, the Bidder must provide the following information:

- (a) Name of former public servant: _____
- (b) Date of termination of employment or retirement from the Public Service. _____

Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program?

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: _____
 - Number of weeks: _____
- (g) Number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

Contract Number:

Contract Amount:

For all contracts awarded during the lump sum payment period, the total amount of fee that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

5.3.5 Aboriginal Designation

Who is eligible?

- a) An Aboriginal business, which can be:
 - i. a band as defined by the Indian Act
 - ii. a sole proprietorship
 - iii. a limited company



- iv. a co-operative
- v. a partnership
- vi. a not-for-profit organization

in which Aboriginal persons have at least 51 percent ownership and control,

OR

- b. A joint venture consisting of two or more Aboriginal businesses or an Aboriginal business and a non-Aboriginal business(es), provided that the Aboriginal business(es) has at least 51 percent ownership and control of the joint venture.

When an Aboriginal business has six or more full-time employees at the date of submitting the bid, at least thirty-three percent of them must be Aboriginal persons, and this ratio must be maintained throughout the duration of the contract.

The bidder must certify in its submitted bid that it is an Aboriginal business or a joint venture constituted as described above.

- Our Company is NOT an Aboriginal Firm, as identified above.
- Our Company IS an Aboriginal Firm, as identified above. The supplier must complete the certificate in the appropriate clause below.

Signature of Authorized Representative

Date



PART 6 - SUPPLY ARRANGEMENT AND RESULTING CONTRACT CLAUSES

A. SUPPLY ARRANGEMENT

6.1 Arrangement

The Supply Arrangement covers the Work described in the Statement of Work at Annex "A"

6.2 Security Requirements

6.2.1 The following security requirements (the "Security Requirements Check List" (SRCL) and related clauses provided by the Contract Security Program) apply and form part of the Supply Arrangement.

The following SRCLs apply to the following work streams below:

Workstream A – Support to Strategic Planning – SRCL17-161, SRCL 17-162

Workstream B – Program Delivery and Monitoring – SRCL17-161, SRCL 17-162

Workstream C – Recipient and/or Financial Audits – SRCL17-161, SRCL 17-162, SRCL 17-163

Workstream D – Economic Analysis and Research – SRCL17-161, SRCL 17-162, SRCL 17-164

Workstream E – Technical Support – SRCL17-161, SRCL 17-162

Workstream F – Program Support – SRCL17-161, SRCL 17-162

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

PWGSC FILE # 5000033922-17-161 - Revision1 (ALL STREAMS)

1. The Contractor/Offeror must, at all times during the performance of the Contract, hold a valid Designated Organization Screening (DOS), with approved Document Safeguarding at the level of PROTECTED B, issued by the Canadian Industrial Security Directorate (CISD), **Public Works and Government Services Canada (PWGSC)**.
2. The Contractor/Offeror personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by CISD/**PWGSC**. Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by CISD/**PWGSC**, the Contractor/ personnel **MAY NOT HAVE ACCESS** to **PROTECTED** information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an escort.
3. Processing of PROTECTED materiel electronically at the Contractor/Offeror's site is NOT permitted under this Contract/Standing Offer.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/**PWGSC**.
5. The Contractor/Offeror must comply with the provisions of the:
 - (a) Security Requirements Check List and security guide (if applicable), attached at Annex _____;
 - (b) Industrial Security Manual (Latest Edition).



SECURITY REQUIREMENTS

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

PWGSC FILE # 5000033922-17-162 - Revision1 (ALL STREAMS)

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC).
2. The Contractor/Offeror personnel requiring access to sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/PWGSC. Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by CISD, PWGSC, the Contractor personnel **MAY NOT ENTER** sites without an escort.
3. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC.
4. The Contractor/Offeror must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex ____;
 - b) *Industrial Security Manual* (Latest Edition).

SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

PWGSC FILE # SRCL - 5000033922-17-163 - Revision 1 (WORKSTREAM "C" ONLY)

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



SECURITY REQUIREMENT FOR CANADIAN SUPPLIER:

PWGSC FILE # 5000033922-17-164 - Revision1 (WORKSTREAM "D" ONLY)

1. The Contractor/Offeree must, at all times during the performance of the Contract/Standing Offer, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), **Public Works and Government Services Canada (PWGSC)**.
2. The Contractor/Offeree personnel requiring access to PROTECTED information, assets or sensitive work site(s) must EACH hold a valid **RELIABILITY STATUS**, granted or approved by CISD/**PWGSC**. Until the security screening of the Contractor personnel required by this Contract has been completed satisfactorily by CISD/**PWGSC**, the Contractor/ personnel **MAY NOT HAVE ACCESS** to **PROTECTED** information or assets, and **MAY NOT ENTER** sites where such information or assets are kept, without an escort.
3. The Contractor/Offeree **MUST NOT** remove any PROTECTED information or assets from the identified work site(s), and the Contractor/Offeree must ensure that its personnel are made aware of and comply with this restriction.
4. Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/**PWGSC**.
5. The Contractor/Offeree must comply with the provisions of the:
 - a) Security Requirements Check List and security guide (if applicable), attached at Annex _____;
 - b) Industrial Security Manual (Latest Edition).

6.2.2 Supplier's Sites or Premises Requiring Safeguarding Measures

- 6.2.2.1** Where safeguarding measures are required in the performance of the Work, the Supplier must diligently maintain up-to-date the information related to the Supplier's and proposed individuals' sites or premises, for the following addresses:

Street Number / Street Name, Unit / Suite / Apartment Number
City, Province, Territory / State
Postal Code / Zip Code
Country

- 6.2.2.2** The Company Security Officer must ensure through the [Contract Security Program](#) that the Contractor and individual(s) hold a valid security clearance at the required level.

6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Supply Arrangement and resulting contract(s) 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

2020 (2017-09-21) General Conditions - Supply Arrangement - Goods or Services, apply to and form part of the Supply Arrangement.



Section 1 – should be amended as follows:

DELETE: Public Works and Government Services Canada

INSERT: Natural Resources Canada

6.3.2 Supplemental General Conditions

Any additional supplemental general conditions, including intellectual property, will be decided during the RFP stages and on a contract-by-contract basis.

6.3.3 International Sanctions

Persons in Canada, and Canadians outside of Canada, are bound by economic sanctions imposed by Canada. As a result, the Government of Canada cannot accept delivery of goods or services that originate, either directly or indirectly, from the countries or persons subject to economic sanctions. Details on existing sanctions can be found at: <http://www.dfait-maeci.gc.ca/trade/sanctions-e.asp>.

It is a condition of this Contract that the Contractor not supply to the Government of Canada any goods or services which are subject to economic sanctions.

By law, the Contractor must comply with changes to the regulations imposed during the life of the contract. During the performance of the Contract should the imposition of sanctions against a country or person or the addition of a good or service to the list of sanctioned countries or the additions of a good or service to the list of sanctioned goods or services cause an impossibility of performance for the Contractor, the situation will be treated by the Parties as a force majeure. The Contractor shall forthwith inform Canada of the situation; the procedures applicable to force majeure shall then apply.

6.3.4 Dispute Resolution

Mediation

If a dispute arising from this contract cannot be settled amicably through negotiation, then the parties agree in good faith to submit the dispute to mediation as administered by the Arbitration and Mediation Institute of Canada Inc. (AMC). The parties acknowledge receipt of the rules of AMC. The cost of mediation shall be borne equally by the parties.

Arbitration

If the parties cannot resolve the dispute through mediation within sixty (60) days, the parties agree to submit the dispute to arbitration pursuant to the Commercial Arbitration Act (Canada). The party requesting such arbitration shall do so by written notice to the other party/parties. The cost of the arbitration and fees of the arbitrator shall be borne equally by the parties. The arbitration shall take place in the city where the contractor carries on business before a single arbitrator to be chosen jointly by the parties. If the parties cannot agree on the choice of arbitrator within thirty (30) days of written notice to submit the dispute to arbitration, each party will choose a representative who will select the arbitrator.

The parties may determine the procedure to be followed by the arbitrator in conducting the proceedings, or may ask the arbitrator to do so. The arbitrator shall issue a written award within thirty (30) days of hearing the parties. The award may be entered in any court having jurisdiction and enforced as a judgment of that court.



Meaning of "Dispute"

The parties agree that the word "dispute" in this clause refers to a dispute of fact or of law, other than a dispute of public law.

6.3.5 Withholding Tax of 15 Percent (%)

The Contractor agrees that, pursuant to the provisions of the Income Tax Act, Canada is empowered to withhold an amount of 15% of the price to be paid to the Contractor, if the Contractor is a non-resident Contractor as defined in said Act. This amount will be held on account with respect to any liability for taxes which may be owed to Canada.

6.3.6 Foreign Nationals (Canadian Contractor or Foreign Contractor)

SACC Manual clause [A2000C](#) (2006-06-16) - Foreign Nationals (Canadian Contractor); or
SACC Manual clause [A2001C](#) (2006-06-16) - Foreign Nationals (Foreign Contractor)

6.3.7 Closure of Government Offices

Contractor employees are personnel of the Contractor and are paid by the Contractor on the basis of services rendered. Where Contractor's employees are providing services on government premises pursuant to this contract and the said premises become non-accessible due to evacuation or closure of government offices and consequently no work is being performed as a result of the closure, Canada will not be liable for payment to the Contractor for the period of the closure.

6.3.8 Supply Arrangement Reporting

The Supplier must compile and maintain records on its provision of goods, services or both to the federal government under contracts resulting from the Standing Offer. This data must include all purchases, including those paid for by a Government of Canada Acquisition Card.

The Supplier must provide this data in accordance with the reporting requirements detailed in Annex "A". If some data is not available, the reason must be indicated. If no goods or services are provided during a given period, the Supplier must still provide a "NIL" report.

The data must be submitted on a quarterly basis to the Standing Offer Authority.

The quarterly reporting periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31;

4th quarter: January 1 to March 31.

The data must be submitted to the Standing Offer Authority no later than **ten (10)** calendar days after the end of the reporting period.

6.4 Term of Supply Arrangement

6.4.1 Period of the Supply Arrangement

The period for the Supply Arrangement is for an initial **twenty-four (24)** month period from Supply Arrangement Award with two **(2)** additional **twelve (12)** month option periods.

The period for awarding contracts under the Supply Arrangement begins January 2019.



6.4.2 Option to Extend Supply Arrangement

NRCan reserves the right to extend the period of the Supply Arrangement indefinitely, under the same terms and conditions. The Supply Arrangement has no defined end-date and will remain valid until such time as Canada no longer considers it to be advantageous to use it. NRCan may exercise the option, or any extension thereof, at any time by written notice to the Offeror (Contractor) at least 30 calendar days prior to the Supply Arrangement expiry date.

The option may only be exercised by the Project Authority and any extension to the period will be evidenced through a formal Standing Offer amendment issued by the Contracting Authority.

6.5 Authorities

6.5.1 Supply Arrangement Authority

The Supply Arrangement Authority is:

Name: **Gerald Baran**
Title: Senior Procurement Officer
Natural Resources Canada
Finance and Procurement Branch
Address: 506 West Burnside Road
Victoria, British Columbia
Telephone: 250-298-2502
Facsimile: 250-363-3222
E-mail address: gerald.baran@canada.ca

The Supply Arrangement Authority is responsible for the issuance of the Supply Arrangement, its administration and its revision, if applicable.

6.5.2 Supplier's Representative

Name:
Title:
Company:
Telephone:
Facsimile:
Email:

6.6 Identified Users

The Identified User is: **Natural Resources Canada**

6.7 On-going Opportunity for Qualification

A Notice will be posted once a year on the Government Electronic Tendering Service (GETS) to allow new Suppliers to become qualified. Existing qualified Suppliers, who have been issued a supply arrangement, will not be required to submit a new arrangement.



6.8 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 the Supply Arrangement;
- (b) the general conditions 2020 (2017-09-21), General Conditions - Supply Arrangement - Goods or Services
- (c) Annex "A", Statement of Work;
- (d) Annex "B", Basis of Payment";
- (e) the Supplier's arrangement dated _____

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Supplier in its arrangement or precedent to issuance of the Supply Arrangement (SA), and the ongoing cooperation in providing additional information are conditions of issuance of the SA and failure to comply will constitute the Supplier in default. Certifications are subject to verification by Canada during the entire period of the SA and of any resulting contract that would continue beyond the period of the SA.

6.10 Applicable Laws

The Supply Arrangement (SA) and any contract resulting from the SA must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____.

B. REQUEST FOR PROPOSAL

6.1 Bid Solicitation Documents

Canada will use the following bid solicitation templates based on the estimated dollar value and complexity of the requirement:

- Simple, for low dollar value requirements;
- Medium Complexity (MC) for medium complexity requirements;
- High Complexity (HC) for more complex requirements.

A copy of the template(s) can be provided upon request by contacting the Strategic Policy Integration Division by sending a query to TPSGC.Outilsdapprovisionnement-ProcurementTools.PWGSC@tpsgc-pwgsc.gc.ca.

Note: References to the HC, MC and Simple templates in PWGSC Requests for Supply Arrangements are provided as examples only. The latest versions of the template and terms and conditions will be used at time of bid solicitation.

The bid solicitation will contain as a minimum the following:

- (a) security requirements;
- (b) a complete description of the Work to be performed;
- (c) 2003 (2018-05-22), Standard Instructions - Goods or Services - Competitive Requirements;



Subsection 3.a) of Section 01, Integrity Provisions - Bid of the Standard Instructions [2003](#) (2018-05-22) incorporated by reference above is deleted in its entirety and replaced with the following:

- a. at the time of submitting an arrangement under the Request for Supply Arrangements (RFSA), the Bidder has already provided a list of names, as requested under the *Ineligibility and Suspension Policy*. During this procurement process, the Bidder must immediately inform Canada in writing of any changes affecting the list of directors.”
- (d) bid preparation instructions;
- (e) instructions for the submission of bids (address for submission of bids, bid closing date and time);
- (f) evaluation procedures and basis of selection;
- (g) financial capability (*if applicable*);
- (h) certifications;
 - **Federal Contractors Program (FCP) for Employment Equity - Notification**
 - SACC Manual [A3005T](#), [A3010T](#) for service requirements when specific individuals will be proposed for the work;
 - **Integrity Provisions - Declaration of Convicted Offences;**
- (i) conditions of the resulting contract.

6.2 Bid Solicitation Process

6.2.1 Bids will be solicited for specific requirements within the scope of the Supply Arrangement (SA) from Suppliers who have been issued a SA.

6.2.2 The bid solicitation will be sent directly to Suppliers.

6.3 Overview of the Procurement Process

6.3.1 Step 1 - Statement of Work (SOW)

In the first step NRCan will determine the quantity, level(s) of the services to be performed described in Annex “A” for the specific streams identified within Appendix “1”.

6.3.2 Step 2 - Request for Proposal (RFP)

In the second step a RFP will be issued by NRCan, if it is to be a competitive solicitation. The RFP will be sent by email to SA Holders.

Note: NRCan may, at its sole discretion, limit the invitation to Aboriginal SA Holders

The SA Holder will have to respond to the RFP within the identified (approximately five (5) business days date and time of solicitation) by replying to the e-mail sent by NRCan.



Suppliers may request written clarification of RFP requirements. Such requests for clarification shall be sent to the Contracting Authority (CA) through electronic means or through written correspondence within 2 days of issuance of RFP by NRCan.

The CA Authority will answer clarification requests to all invited suppliers. As a result of clarification requests, the CA Authority will determine if any revisions to SOW requirements or evaluation criterion are required, and if necessary, issue an amended RFP.

6.3.3 Step 3 - Basis of Selection

The Basis of Selection will be determined at the RFP stage.

6.3.4 Step 4 – Contract Award

Contracts awarded by the CA authority will be in accordance with Section II; Part B (Resulting Contract Clauses, Terms and Conditions for Stage 2 of the Procurement Process) of the SA. The contract will incorporate the level(s) of services to be performed as described at Annex “B”; and, the quote by reference. The Contract authorizes the supplier to proceed as per deliverable schedule. The supplier shall not commence work until an approved Contract has been received from the CA authority. The SA Holder acknowledges that any and all work performed in the absence of the aforementioned Contract will be done at the SA Holder’s own risk, and Canada shall not be liable for payment therefore, unless or until a Contract is provided by the CA authority.

6.3.5 Step 5 - Notification to suppliers

At contract award, the CA Authority (CA) will notify all suppliers which supplier is being awarded the contract.

6.3.6 Step 6 - Contract Amendments

The estimated total cost authorized for each Contract is not to be exceeded unless and until an increase is authorized by a formal Contract amendment. No amendment of a Contract will be binding upon the contractor or Canada unless a formal Contract amendment has been issued by the contracting authority in writing. Likewise, the NRCan shall not be liable for any adjustment to the price of a Contract on account of a change, unless the change is authorized in writing by the Contracting Authority.

1) For requirements up to \$25,000.00 HST included

(a) For non-competitive.

The CA Authority (Contracting Authority) for Natural Resources Canada will select a SA Holder to solicit a proposal.

(b) For competitive

NRCan reserves the right to solicit bids competitively at the discretion of the Contracting Authority. The Contracting Authority will send the selected SA Holders a competitive RFP. The RFP will include a detailed statement of work, the delivery date, the evaluation criteria (if applicable) as well as any other pertinent information as deemed necessary. NRCan reserves the right to solicit bids with a short response time if deemed necessary.

All requirements will be processed through SSO Procurement unless indicated otherwise.

2) For requirements Exceeding \$25,000.00 but less than \$100,000.00 HST included

The Contracting Authority will select a minimum of three (3) SA Holders. NRCan reserves the right to invite additional SA Holders based on operational requirements. The Contracting Authority will send the selected SA Holders a competitive RFP



by e-mail to the SA Holder's identified contact. The RFP will include a detailed statement of work, the delivery date, the evaluation criteria (if applicable) as well as any other pertinent information as deemed necessary. NRCan reserves the right to solicit bids with a short response time if deemed necessary.

3) For requirements between \$ 100,000.00 and two million dollars, HST included

A quotation or a request for proposals will be sent by email to the contact person of all SA. The RFP includes a detailed statement of work, date of delivery, assessment criteria (if applicable) and any other relevant information as required. NRCan reserves the right to request proposals within tight timeframe if necessary.

Discretion to supplement the list of invited suppliers

NRCan reserves the invite or allow potential suppliers outside of the SA holders that result from the RFSA, to submit bids at its sole discretion in any resulting solicitation. (For example, we might consider this if we ended up with a single potential supplier for a given requirement. Other circumstances might also call for this consideration).

C. RESULTING CONTRACT CLAUSES

6.1 General

The conditions of any contract awarded under the Supply Arrangement will be in accordance with the resulting contract clauses of the template used for the bid solicitation.

For any contract to be awarded using the template:

- (a) **Simple** (for low dollar value requirements), general conditions 2029 (2016-04-04) will apply to the resulting contract;
- (b) **MC** (for medium complexity requirements), general conditions 2010B (2018-06-21) will apply to the resulting contract;
- (c) **HC** (for high complexity requirements), general conditions 2035 (2018-06-21) will apply to the resulting contract.

A copy of the template(s) can be provided upon request by contacting the Strategic Policy Integration Division by sending a query to TPSGC.Outilsdapprovisionnement-ProcurementTools.PWGSC@tpsgc-pwgsc.gc.ca.

Note: References to the HC, MC and Simple templates in PWGSC Requests for Supply Arrangements are provided as examples only. The latest versions of the template and terms and conditions will be used at time of bid solicitation.



ANNEX "A" - STATEMENT OF WORK

TITLE: ENERGY ANALYSIS AND DATA COLLECTION SERVICES

SW1 REQUIREMENT

To deliver various TASKS in support of any WORK STREAM and for any ECONOMIC ACTIVITY as identified in **APPENDIX 1**.

SW2 BACKGROUND

The Office of Energy Efficiency (OEE) at Natural Resources Canada (NRCan) has a mandate to communicate the importance and value of energy efficiency and alternative transportation fuels and to advise the public on actions they can take to contribute to individual and societal benefits. The OEE builds on efforts by NRCan to promote energy conservation and continuous increases in energy efficiency as ways to help protect the environment and strengthen Canada's economic competitiveness. As such, the OEE has become Canada's centre of excellence for energy efficiency and alternative fuels information.

The OEE strengthens and expands Canada's commitment to energy efficiency to address the Government of Canada's policy objectives. To meet these policy objectives, the OEE collects and analyzes energy efficiency data, trends in energy use and the development and delivery of key programs that promote energy efficiency in the built environment, industry, transportation, equipment and appliances sectors as well as the overall economy.

Further information pertaining to the Office of Energy Efficiency is available at <http://oee.nrcan.gc.ca/english/>.

SW3 SCOPE AND TASKS

See **APPENDIX 1**

SW4 ROLES AND RESPONSIBILITIES OF RESOURCES

WORK STREAMS A TO D (See APPENDIX 1 for a definition of Work Streams)

Project Manager:

Role: Complete the project on time, within budget, and as per approved **Mini-RFP**. Establish the project's resource requirements, clearly define objectives and properly assign tasks to team members.

Responsibilities:

- Act as the main point of contact for the Technical Authority and the **Project Authority**.
- Lead and manage the project team.
- Develop and maintain a detailed project plan and ensure business continuity.
- Plan and coordinate the activities of the project including assigned work, financial, planning, and contracting aspects.
- Prepare and submit reports to the **Project Authority**.
- Record, manage, resolve project issues and maintain regular communication with the **Project Authority** concerning project issues.
- Depending on the nature of work, establish an appropriate Steering/Advisory Committee (which includes the **Project Authority**). Refer to **Mini-RFP** for details.



Senior Researcher/Analyst:

Role: Conduct studies and surveys applicable to the work stream(s) for which they qualify; the development, application and evaluation of statistical and survey methods and systems; and the development and interpretation of qualitative and quantitative information. Develop analytical methods pertaining to the work.

Responsibilities:

- Work with the Project Manager and the **Project Authority** to develop project scope and work plan to meet task requirements of applicable work stream.
- Liaise regularly with the **Project Authority** to obtain, exchange, and clarify data and information.
- Conduct other activities as required:
 - Comprehensive research and studies.
 - Maintain a strong understanding of program requirements and its linkages to policy/program development.
 - Develop procedures for collecting, extracting, and verifying statistics.
 - Develop data standards and statistical information products.
 - Develop and apply analytical tools, analytical statistical methods and techniques, and databases.
 - Develop and enhance models to collect, aggregate and analyze energy supply, demand and emission statistics, as well as natural resource and socio-economic data, and provide advice on the availability and performance of models.
 - Develop statistical surveys and testing, and evaluate survey questionnaires, analyze and present the survey results and statistical outputs.
 - Conduct survey and statistical projects to develop, collect, process, analyze, market, and disseminate statistical information.
 - Carry out statistical, mathematical, and trend analyses and perform calculations for use in studies using statistical methods and techniques, and cost-benefit analysis as well as impact and comparative analysis.
 - Analyze data and prepare reports and presentations of findings.
- Participate in project meetings.

Researcher/Analyst:

Role: Support the Senior Researcher/Analyst in conducting studies, research, compilation and analysis of data, information, and trends. Assist with the preparation of papers and reports, maintenance and development of data and databases, and ensure the confidentiality and quality of data and information.

Responsibilities:

- Conduct background literature searches and analysis.
- Perform data gathering, processing, and analysis.
- Develop and update data profiles, definitions, and coding.
- Develop and enhance databases.
- Assist in reviewing studies, data, and methodologies in support of new studies to determine accuracy, consistency, and validity.
- Assist in the development and enhancement of models to collect, aggregate and analyze energy supply, demand and emission statistics, as well as natural resource and socio-economic data.
- Assist in the development and application of analytical tools, statistical methods and techniques, and databases.
- Undertake statistical programs systems validation and technical assessments.
- Identify and compile data and information, and perform statistical, mathematical, and trend analyses.
- Identify data gaps and deficiencies.
- Integrate findings and results for the Senior Researcher and Analyst.
- Update and improve procedures for collecting, extracting, and verifying statistics.



- Participate in statistical surveys, testing and evaluation of survey questionnaires.

Junior Resource:

The Junior Resource may be used to perform the type of work described under “Responsibilities” below. **The Junior Resource will not be evaluated and will not form part of the Bidder’s proposal**, but must meet the minimum education and experience listed below in order to perform work resulting from this solicitation. The Junior Resource must possess, or be in the process of obtaining:

- At a minimum, a post-secondary degree, diploma or certificate from a recognized Canadian university or college, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada; and
- A minimum of six (6) months experience in a work environment.

Role: To assist the team in conducting work by gathering information, and updating files.

Responsibilities:

- Perform basic data collection, data entry and compilation.
- Conduct background literature searches.
- Assist the Senior Researcher/Analyst and or Researcher/Analyst with updating data profiles, definitions, coding, and procedures.

WORK STREAM E (See APPENDIX 1 for definition of Work Streams)

Project Manager:

Role: Complete the project on time, within budget, and as per approved **Mini-RFP**. Establish the project’s resource requirements, clearly define objectives and properly assign tasks to team members.

Responsibilities:

- Act as the main point of contact for the Technical Authority and the **Project Authority**.
- Lead and manage the project team.
- Develop and maintain a detailed project plan and ensure business continuity.
- Plan and coordinate the activities of the project including assigned work, financial, planning, and contracting aspects.
- Prepare and submit reports to the **Project Authority**
- Record, manage, resolve project issues and maintain regular communication with the **Project Authority** concerning project issues.
- Depending on the nature of work, establish an appropriate Steering/Advisory Committee (which includes the Project Authority). Refer to **Mini-RFP** for details.

Senior Technical Advisor:

Role: Provide technical support relating to energy management practices

Responsibilities:

- Work with the Project Manager and the **Project Authority** to develop project scope and work plan to meet task requirements of applicable work stream.
- Liaise regularly with the **Project Authority** to obtain, exchange, and clarify data and information.
- Conduct and advise on energy and carbon assessments and audits
- Advise on retrofits and other activities that improve the energy performance of commercial and institutional existing buildings



- Advise on designs of high performing new buildings
- Develop guides and provide advice relating to HVAC, electrical, building envelope, controls, lighting and other equipment in commercial buildings
- Participate in project meetings.

Senior Energy Simulation Software Developer/Analyst:

Role: Develop and maintain software and/or databases applicable to the work stream for which they qualify.

Responsibilities:

- Work with the Project Manager and the **Project Authority** to develop project scope and work plan to meet task requirements of applicable work stream.
- Liaise regularly with the **Project Authority** to obtain, exchange, and clarify data and information.
- Conduct other activities as required:
 - Lead and manage all aspects of software and/or specifications, development, testing and creation of software releases.
 - Work with the Technical and **Project Authority** on acceptance testing.
 - Manage and report all software bugs and enhancements as requested by the **Project Authority** and work with the **Project** and the Technical **Authority** to prioritize tasks.
 - Work with external stakeholders to determine their software needs and implement these changes in NRCan software.
 - Provide recommendations for future growth and direction of software and/or databases.
 - Analyze data and prepare reports and presentations of findings.
- Participate in project meetings.

Senior Researcher/Analyst:

Role: Conduct studies and surveys applicable to the work stream for which they qualify; the development, application and evaluation of statistical and survey methods and systems; and the development and interpretation of qualitative and quantitative information. Develop analytical methods.

Responsibilities:

- Work with the Project Manager and the **Project Authority** to develop project scope and work plan to meet task requirements of applicable work stream.
- Liaise regularly with the **Project Authority** to obtain, exchange, and clarify data and information.
- Conduct other activities as required:
 - Conduct comprehensive research and studies.
 - Maintain a strong understanding of program requirements and its linkages to policy and program development.
 - Develop procedures for collecting, processing, verifying, and analyzing statistics.
 - Develop data standards and statistical information products.
 - Develop, maintain and apply analytical tools, analytical statistical methods and techniques, and databases.
 - Develop and enhance models to collect, aggregate and analyze energy supply, demand and emission statistics, as well as natural resource and socio-economic data, and provide advice on the availability and performance of models.
 - Develop statistical surveys and testing, evaluate survey questionnaires, analyze and present the survey results and statistical outputs.
 - Conduct survey and statistical projects to develop, collect, process, analyze, and disseminate statistical information.
 - Carry out statistical, mathematical, and trend analyses and perform calculations for use in studies using statistical methods and techniques, and cost-benefit analysis as well as impact and comparative



- analysis.
- Analyze data and prepare reports and presentations of findings.
- Participate in project meetings.

Researcher/Analyst/Advisor:

Role: Support the Senior Technical Advisor, and/or Senior Energy Simulation Software Developer/Analyst and/or Senior Researcher/Analyst in the conduct of studies, research, compilation and analysis of data, information, and trends. Assist with the preparation of papers and reports, maintenance and development of data and databases, and ensure the confidentiality and quality of data and information.

Responsibilities:

- Conduct background literature searches and analysis.
- Perform data gathering, processing, and analysis.
- Develop and update data profiles, definitions, and coding.
- Develop and enhance databases.
- Assist in reviewing studies, data, and methodologies in support of new studies to determine accuracy, consistency and validity.
- Assist in the development and enhancement of models to collect, aggregate and analyze energy supply, demand and emission statistics, as well as natural resource and socio-economic data.
- Assist in the development and application of analytical tools, statistical methods and techniques, and databases.
- Undertake statistical programs systems validation and technical assessments.
- Identify and compile data and information, and perform statistical, mathematical, and trend analyses.
- Identify and report data gaps and deficiencies.
- Integrate findings and results for the Senior Technical Advisor or Senior Researcher/Analyst.
- Update and improve procedures for collecting, processing, and verifying statistics.
- Participate in statistical surveys, testing and evaluation of survey questionnaires.

WORK STREAM F (See APPENDIX 1 for a definition of Work Streams)

Manager/Facilitator:

Role: Complete the project on time, within budget, and as per approved **Mini-RFP**. Establish the project's resource requirements, clearly define objectives, and properly assign tasks to team member(s).

Responsibilities:

- Act as the main point of contact for the Technical Authority and the **Project Authority**.
- Lead and manage the project team.
- Develop and maintain a detailed project plan and ensure business continuity.
- Plan and coordinate the activities of the project including assigned work, financial, planning, and contracting aspects.
- Prepare and submit reports and recommendations to the **Project Authority**.
- Record, manage, resolve project issues and maintain regular communication with the **Project Authority** concerning project issues.
- Perform needs analysis, seek stakeholder feedback.
- Develop training curricula for specific technical and non-technical audiences.
- Review existing training courses and recommend appropriate training strategies.
- Evaluate instructional programs and processes, and develop or recommend improvements to existing instructional material.
- Select instructional media and strategies.



- Pilot test training sessions, and deliver appropriate training sessions.
- Develop consultation approaches and strategies.
- Facilitate consultative processes and sessions.
- Prepare consultation reports and recommendations.
- Have capacity to deliver products in both official languages.

Analyst:

Role: Support the Manager/Facilitator in conducting training, facilitation, consultation and evaluation as per the tasks required. Assist the Manager/Facilitator with the delivery and presentation of reports, recommendations, processes, strategies, facilitation, training, consultations and evaluation as per the tasks required.

Responsibilities:

- Work with the Manager/Facilitator to develop the project scope and work plan to meet task requirements of applicable work stream.
- Provide support in other activities as required:
 - Analyse needs, seek stakeholder feedback
 - Develop training curricula for specific technical and non-technical audience
 - Review existing training courses and recommendations of appropriate training strategies
 - Evaluate instructional programs and processes; the development or recommendation of improvements to existing instructional material
 - Select instructional media and strategies
 - Pilot test training sessions; delivery of appropriate training sessions
 - Develop consultation approaches and strategies
 - Help facilitate consultative processes and sessions
 - Prepare of consultation reports and recommendations
 - Take notes during consultation meetings or sessions.

SW5 TRAVEL

There may be a requirement to travel to the National Capital Region to attend project kick-off meetings. These kick-off meetings, if necessary, would require the attendance of the Senior Researcher /Analyst at a minimum. If travel is deemed necessary by the **Project Authority**, the requirements will be specified in the scope of the work and will form part of the approved Contract. ALL TRAVEL MUST BE PRE-APPROVED.

SW6 DELIVERABLES

Deliverables include, but are not limited to:

- a) work plans;
- b) reporting templates;
- c) electronic spreadsheets;
- d) data and information questionnaires;
- e) databases;
- f) documentation;
- g) analytical reports;
- h) progress reports;
- i) draft reports;
- j) final reports;
- k) presentations;



- l) results of feasibility studies;
- m) financial and investment decision models; and
- n) reporting frameworks;

The period to perform the work, document formats, and delivery dates will be specified in each Request for Proposal and resulting contract.



ANNEX "B" - BASIS OF PAYMENT

(To be determined and specified in each Request for Proposal and resulting contract)



ANNEX "C" - SECURITY REQUIREMENTS & SECURITY REQUIREMENTS CHECKLIST

(Please see below - all copies attached at the end of this document)

- 1) SRCL 17-161
- 2) SRCL 17-162
- 3) SRCL 17-163 (Part A - Security Guide; Part B - Security Guide; Part C - Safeguards/ IT Media - 11d = yes (NRCan Security Requirements - Technical Document)
- 4) SRCL 17-164



APPENDIX 1 - WORK STREAM DEFINITIONS

WORK STREAM	TASKS including, but not limited to:	ECONOMIC ACTIVITY*
A) Support to Strategic Planning	<ul style="list-style-type: none"> ▪ Develop business plans ▪ Provide strategic policy planning and implementation services ▪ Identify data and information requirements to develop policy proposal options ▪ Prepare data, information and analytical material (e.g.: SWOT analyses) to develop and support policy proposals or to be used in departmental policy papers and presentations ▪ Assess policy strategies and positions on energy efficiency activities ▪ Prepare reports and presentations on findings and recommendations 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances ▪ Overall economy
B) Program Delivery and Monitoring	<ul style="list-style-type: none"> ▪ Develop performance indicators ▪ Track, monitor and analyze energy efficiency program activities and performance (e.g.: net-to-gross study) ▪ Conduct assessments of needs to inform the development of new programs or the modification of existing ones ▪ Prepare technical and statistical fact sheets, best practices guides and other program support documents and information ▪ Identify data requirements and develop data collection strategies and tools (e.g.: survey questionnaires) ▪ Assess data availability, quality, and identify gaps ▪ Quality assurance and validation of programs' data ▪ Collect (via surveys or other means), validate and analyze data related to program activities (e.g. fenestration data validation) or segments of the energy efficiency market (e.g. ENERGY STAR participant survey...) ▪ Analyze data to inform policy and program development using statistical methods (e.g. regression analysis) 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances
C) Recipient and/or Financial Audits	<ul style="list-style-type: none"> ▪ Perform or provide support to financial, technical and compliance audits ▪ Prepare reports on findings and recommendations 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances
D) Economic Analysis and research	<ul style="list-style-type: none"> ▪ Assess micro and macro economic impacts of efficiency activities and investments (e.g. job creations, GDP, prices, cost of energy services...) ▪ Identify and analyze barriers and gaps to energy efficiency (e.g.: perceived cost or risk...) ▪ Analyze markets for energy services and energy-using products ▪ Assess/compare energy using and carbon markets and programs in Canada and internationally (e.g. comparative analyses of Canada with other countries' policies, standards and codes...) ▪ Assess the potential and uptake of energy efficient technologies, behaviour and, operation & maintenance best practices (e.g. Net Zero Energy and emissions concepts) ▪ Produce feasibility studies, statistical assessments and reports on findings ▪ Prepare cost curves (e.g.: operating cost, perceived cost...) 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances ▪ Overall economy
E) Technical Support	<ul style="list-style-type: none"> ▪ Conduct and provide advice relating to energy and carbon assessments, energy and carbon audits, monitoring and verification, new building designs, near net zero buildings, benchmarking, commissioning and building optimization ▪ Develop/maintain modeling tools ▪ Conduct computer programming (e.g. CanQuest modeling tool for energy building codes) ▪ Recommend/develop/maintain tools, methods and software related to energy management and efficiency performance (e.g. ENERGY STAR calculator, fenestration data import tool) ▪ Analyze/evaluate/develop technical specifications ▪ Produce technical material for programs (e.g. toolkits, applications) and publications (e.g. case studies, guidebooks, factsheets and others) ▪ Provide recommendations for the development, maintenance and use of tools to support energy management, including software tools ▪ Develop approach to reconcile simulated results with collected data ▪ Prepare technical studies on current and emerging technologies, energy management practices and issues 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances



F) Program Support	<ul style="list-style-type: none"> ▪ Facilitate, coordinate and manage outcomes of consultation meetings related to program or sector of activity ▪ Develop and/or deliver training and workshops 	<ul style="list-style-type: none"> ▪ Built environment ▪ Industry ▪ Transportation ▪ Equipment and appliances
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*Built environment:

- Residential buildings: single family homes, low rise and high rise apartments, multi-unit residential buildings
- Commercial and institutional buildings: offices, schools, health care, retail, accommodations, multi-purpose buildings

Industries: manufacturing, mining, small and medium businesses

Transportation: passenger and freight transport (road, rail, marine, air)

Equipment and appliances: energy consuming appliances and equipment, or having an influence on energy use

Overall economy: macro oriented economic activities (e.g. GDP, job creations, prices)

Other tasks: The Contractor may be required to attend meetings to present the findings of the project. Detailed descriptions, requirements and location of meetings will be part of the RFP.

RECEIVED

MAY 09 2018



Government of Canada

Gouvernement du Canada

17-161 REVISED (Ticket 140886)

Contract Number / Numéro du contrat

5000033922

Security Classification / Classification de sécurité

SECURITY REQUIREMENTS CHECK LIST (SRCL)

LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: Natural Resources Canada; 2. Branch or Directorate / Direction générale ou Direction: Office of Energy Efficiency

3. a) Subcontract Number / Numéro du contrat de sous-traitance; 3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail: All Stream: A) Support to Strategic Planning; B) Program Delivery and Monitoring; C) Recipient Audits; D) Economic Analysis and Research; E) Technical Support and; F) Program Support

5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? [X] No / [] Yes

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? [X] No / [] Yes

6. Indicate the type of access required / Indiquer le type d'accès requis

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? [] No / [X] Yes

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. [X] No / [] Yes

6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? [X] No / [] Yes

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès: Canada [X], NATO / OTAN [], Foreign / Étranger []

7. b) Release restrictions / Restrictions relatives à la diffusion: No release restrictions / Aucune restriction relative à la diffusion [X]; Not releasable / À ne pas diffuser []; Restricted to: / Limité à: []

7. c) Level of Information / Niveau d'information: PROTECTED A / PROTÉGÉ A [X]; PROTECTED B / PROTÉGÉ B [X]; PROTECTED C / PROTÉGÉ C []; CONFIDENTIAL / CONFIDENTIEL []; SECRET []; TOP SECRET / TRÈS SECRET []; TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) []



Government of Canada / Gouvernement du Canada

17-161 REVISED (Ticket 140886)

Contract Number / Numéro du contrat

500003922

Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui
If Yes, indicate the level of sensitivity.
Dans l'affirmative, indiquer le niveau de sensibilité:

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

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

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

Special comments:

Commentaires spéciaux :

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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



Government of Canada

Gouvernement du Canada

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Contract Number / Numéro du contrat

6000033922

Security Classification / Classification de sécurité

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

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

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

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



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat 50000033922
Security Classification / Classification de sécurité

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Natural Resources Canada		2. Branch or Directorate / Direction générale ou Direction Office of Energy Efficiency/ Housing Division
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail All streams: Support to strategic planning (A), Program delivery and monitoring (B), Recipient Audits (C), Economic Analysis and Research (D), Technical Support (E), Program Support (F).		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



Government of Canada

Gouvernement du Canada

File No. 17-162 REVISED (Ticket 140886)

Contract Number / Numéro du contrat

50000033922

Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity.
Dans l'affirmative, indiquer le niveau de sensibilité:

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicats?

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document:

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

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

- RELIABILITY STATUS COTE DE FIABILITE
TOP SECRET - SIGINT TRÈS SECRET - SIGINT
SITE ACCESS ACCÈS AUX EMPLACEMENTS
CONFIDENTIAL CONFIDENTIEL
NATO CONFIDENTIAL NATO CONFIDENTIEL
SECRET SECRET
NATO SECRET NATO SECRET
TOP SECRET TRÈS SECRET
COSMIC TOP SECRET COSMIC TRÈS SECRET

Special comments:
Commentaires spéciaux:

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté?

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?

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

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada



Gouvernement
of Canada, Gouvernement
du Canada

File No. 17-162 REVISED (Ticket 140886)

Contract Number / Numéro du contrat 5000033922
Security Classification / Classification de sécurité

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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

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

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

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Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat: 5000033922

Security Classification / Classification de sécurité

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

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine: Natural Resources Canada

2. Branch or Directorate / Direction générale ou Direction: Office of Energy Efficiency / TAE

3. a) Subcontract Number / Numéro du contrat de sous-traitance

3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant

4. Brief Description of Work / Brève description du travail: Supplementary Arrangement Umbrella RE: ENERGY ANALYSIS AND DATA COLLECTION SERVICES
Work stream C - Recipient Audits

5. a) Will the supplier require access to Controlled Goods? / Le fournisseur aura-t-il accès à des marchandises contrôlées? No / Yes

5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? / Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? No / Yes

5. c) Indicate the type of access required / Indiquer le type d'accès requis

6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? / Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Yes

6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? / Le fournisseur et ses employés auront-ils accès à des zones d'accès restreintes? No / Yes

6. c) Is this a commercial courier or delivery requirement with no overnight storage? / S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit? No / Yes

7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès

Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
--	--------------------------------------	---

7. b) Release restrictions / Restrictions relatives à la diffusion

No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>	Restricted to / Limité à: <input type="checkbox"/>	Restricted to / Limité à: <input type="checkbox"/>
Specify country(ies) / Préciser le(s) pays: <input type="checkbox"/>	Specify country(ies) / Préciser le(s) pays: <input type="checkbox"/>	Specify country(ies) / Préciser le(s) pays: <input type="checkbox"/>

7. c) Level of information / Niveau d'information

PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada

17-163

17-163 REVISED (Ticket 140886)

Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat 5000033922
Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?
If Yes, indicate the level of sensitivity.
Dans l'affirmative, indiquer le niveau de sensibilité. No / Non Yes / Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Dans l'affirmative, indiquer le niveau de sensibilité. No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel:
Document Number / Numéro du document:

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

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

<input checked="" type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITE	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS	Special comments: Commentaires spéciaux:		

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

T68/90T 350-100(2004/12)

Security Classification / Classification de sécurité
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Canada

17-163 REVISED

Government of Canada / Gouvernement du Canada

17-163 REVISED (Ticket 140886)

Contract Number / Numéro du contrat

5000033922

Security Classification / Classification de sécurité

PARTE C (continued) / PARTIE C (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉE			CLASSIFIED / CLASSIFIÉE		NATO					OTHERS					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	OTHERS TOP SECRET / OTHERS TRÈS SECRET	PROTECTED / PROTÉGÉE			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Responsabilities / Base Production						<input checked="" type="checkbox"/>										
IT Assets / Support IT / User / Technicians		<input checked="" type="checkbox"/>														

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE? No / Non Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans le cadre intitulé « Classification de sécurité » au haut et au bas du formulaire.
12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE? No / Non Oui
- If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).
 Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans le cadre intitulé « Classification de sécurité » au haut et au bas du formulaire et indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).



Security Requirements

The following security requirements (SRCL and related clauses) may apply to future projects:

- Contractor/Offeror requiring access to **SECRET** information must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of **SECRET**, with approved Document Safeguarding and Production Capabilities at the level of **SECRET**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC)
- Future contracts may include access to **Controlled Goods**. Prior to access, the contractor must be registered in the Controlled Goods Program of Public Works and Government Services Canada (PWGSC).
- Contractor/Offeror personnel requiring access to **PROTECTED/CLASSIFIED** information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **RELIABILITY STATUS or SECRET** as required, granted or approved by the CISD/PWGSC.
- Contractors **MUST NOT** utilize its Information Technology systems to electronically process, produce or store any sensitive **PROTECTED/CLASSIFIED** information until CISD/PWGSC has issued written approval. After approval has been granted, these tasks may be performed at the level of **SECRET**.
- Subcontracts which contain security requirements are **NOT** to be awarded without the prior written permission of CISD/PWGSC. 7.3.1.6 The Contractor/Offeror must comply with the provisions of the: (a) Security Requirements Check List and security guide (if applicable), attached at Annex "C"; (b) *Industrial Security Manual* (Latest Edition).

NOTE: There may be **multiple levels of personnel security screenings** associated with individual contracts.

ANNEX "C" - SECURITY REQUIREMENTS & SECURITY REQUIREMENTS CHECK LIST

Security Requirement Checklist (SRCL) Supplemental Security Guide							
Part A - Multiple Release Restrictions: Security Guide							
To be completed in addition to SRCL question 7.b) when release restrictions are therein identified. Indicate to which levels of information release restrictions apply. Make note in the chart if a level of information bears multiple restrictions (e.g. a portion of the SECRET information bears the caveat Canadian Eyes Only while the remainder of the SECRET information has no release restrictions.)							
Canadian Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions		X			X		
Not Releasable							
Restricted to:							
Permanent Residents Included*							
NATO Information							
Citizenship Restriction	NATO UNCLASSIFIED		NATO RESTRICTED	NATO CONFIDENTIAL	NATO SECRET	COSMIC TOP SECRET	
All NATO Countries							
Restricted to:							
Permanent Residents Included*							
Foreign Information							
Citizenship Restriction	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
No Release Restrictions							
Restricted to:							
Permanent Residents Included*							
COMSEC Information							
Citizenship Restrictions	PROTECTED			CLASSIFIED			
	A	B	C	CONFIDENTIAL	SECRET	TOP SECRET	TOP SECRET (SIGINT)
Not Releasable							
Restricted to:							

***When release restrictions are indicated, specify if permanent residents are allowed to be included.**



Part B - Multiple Levels of Personnel Screening: Security Classification Guide

To be completed in addition to SRCL question 10.a) when multiple levels of personnel screening are therein identified. Indicate which personnel screening levels are required for which portions of the work/access involved in the contract.

Level of Personnel Clearance (e.g. Reliability, Secret)	Position / Description/Task	Access to sites and/or information. Levels of Information to be accessed.	Citizenship Restriction (if any)
SECRET	CONTRACTOR AND SUBCONTRACTOR PERSONNEL LABOURER/GENERAL LABOUR	ACCESS TO NRCAN OEE FACILITIES, LIMITED ACCESS TO SECRET INFORMATION	NONE
RELIABILITY	CONTRACTOR AND SUBCONTRACTOR PERSONNEL LABOURER/GENERAL LABOUR	ACCESS TO NRCAN OEE FACILITIES, ACCESS TO PROTECTED DOCUMENTS, NO ACCESS TO CLASSIFIED DOCUMENTS.	NONE

Part C – Safeguards / Information Technology (IT) Media – 11d = yes

IT security requirements must be specified in a separate technical document and submitted with the SRCL

OTHER SECURITY INSTRUCTIONS



IT Security Requirements – Technical Document

*IT Security Requirements for the
Processing and Storage of
Sensitive Information*

Contract #:	
Department:	Natural Resources Canada
Contractor/Supplier:	



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1. INTRODUCTION

This document outlines the Department's IT Security requirements, in conjunction with any other Canadian Industrial Security Directorate (CISD) requirements, in support of the Contractor/Supplier obtaining an official CISD written approval to process and store sensitive information.

In absence of a formal Threat-Risk Assessment (TRA) and due to the IT portion of the Security clearance being contract specific, the intent of this document is to state the minimum safeguards required in order that the processing and storage of sensitive information be approved by the Department's IT Security Coordinator (ITSC).

Security is based upon layers of protection; that is, in order for the requirements of the IT Security (ITS) to effectively safeguard the information, they must be preceded and supported by other aspects of security and the associated policies. The physical, personnel and information security safeguards in accordance with the Policy on Government Security and ITS related Standards must exist prior to the implementation of ITS safeguards.

2. MANDATORY PREREQUISITES

2.1. PWGSC Validation for Physical Security

The application of the security safeguards listed in this document are based on the *mandatory requirement* that the physical premises of the Contractor/Supplier have been inspected, certified and accredited to process and store sensitive information by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services. Hence, for the duration of this contract, the Contractor/Supplier must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of RELIABILITY issued by the CISD to have access to PROTECTED documents. For the duration of this contract, the Contractor/Supplier must hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of SECRET issued by the CISD to have limited access to CLASSIFIED documents

2.2. Personnel Security

All personnel who have access to the material being processed and stored must hold a valid Government of Canada (GC) SECRET Clearance and have the "need to know".

All of the Contractor/Supplier personnel handling sensitive information, in relation to this contract, must attend a mandatory security training/briefing session coordinated and delivered by the Contractor's/Supplier's appointed Company Security Officer or alternates.

2.3. Information Security

All hard copy documents and other media formats must be handled and transported in accordance with GC guidelines. All hard copy documents and other media will be marked

with the appropriate security classification. Any covering letter, transmittal form or circulation slip will be marked to indicate the highest level of classification of the attachments.

Transportation of information associated with this contract into or out of the physical premises must adhere to RCMP G1-009 “*Transport and Transmittal of Protected and Classified Information*”. All processing and storage of sensitive information must be performed within the confines of CISD approved physical locations for this contract.

2.4. Security Policy Compliance Monitoring

The Department retains the right to conduct inspections of the Contractor/Supplier facility to ensure compliance with GC standards and policies with respect to the handling, storage and processing of information relevant to this contract.

3. MINIMUM IT SECURITY REQUIREMENTS

In conjunction with any other requirements established by the CISD, the Contractor/Supplier must meet the following IT Security requirements established by the Department.

3.1. IT Security Policy Compliance and Monitoring

All information technology related operations must adhere to the overall requirements outlined in the GC’s Operational Security Standard: Management of Information Technology Security (MITS). All IT Security requirements addressed to the Department are applicable to the Contractor/Supplier.

The Department retains the right to conduct inspections of the Contractor/Supplier facility to ensure compliance with GC policies and standards with respect to requirements in the Operational Security Standard: Management of Information Technology Security.

3.2. Prevention

As per MITS section 16, the Contractor/Supplier must have all the prevention safeguards in place for the protection of confidentiality, integrity, and availability of the information and IT assets relative to this contract.

3.2.1 Physical Security within the IT Security Environment

Along with providing official assurance that the CISD has approved its facilities to process and store up to SECRET information, the Contractor/Supplier must ensure that all equipment used for the fulfilment of this contract always reside within the CISD approved physical locations and is never connected to a network such as the Internet or an Intranet. For the purpose of SECRET information, unless the Contractor/Supplier operates and maintains a CSEC approved SECRET network, all equipment must strictly be used in stand-alone mode (non-networked).

The Contractor/Supplier must guard and protect all equipment used for this contract from unauthorised access. RCMP SECRET level approved locking containers must be used to store and lock away all SECRET equipment and material in relation to this contract when not in use.

For the duration of this contract, the Contractor/Supplier must setup and maintain an audit log detailing who is using what equipment with the specific dates and time.

3.2.2 Storage, Disposal and Destruction of IT Media

All material such as CD/DVDs, flash/thumb drives, stand-alone (non-networked) workstations, hard drives, stand-alone (non-networked) printers, backup tapes and any other stand-alone devices used to process or store up to SECRET information relative to this contract must be identified and labelled accordingly.

Once connected to the IT equipment used for this contract, all media and material must be treated as SECRET and never be used on a lower classification level system.

In the event of failure and replacement of the equipment or upon termination of the contract, all devices or material must be retained and properly stored or disposed of according to CSEC and RCMP recommendations. The Contractor/Supplier is also responsible for clearing and sanitizing all electronic data storage devices used for this contract according to CSEC's ITSG-06 guideline.

In the event that equipment requires maintenance, support or replacement, the Contractor/Supplier must contact the Department's IT Security Coordinator before taking any action.

All media, when not in use, must be stored in a storage container which is RCMP-approved for the storage of Protected A and/or Protected B information (G1-001 "*Security Equipment Guide*"). All media used for the fulfilment of this contract, when not in use, must be stored in a storage container which is RCMP-approved for the storage of SECRET information (G1-001 "*Security Equipment Guide*"). The storage container must be verified by the CISD.

3.2.3 Authorization and Access Control

The Contractor/Supplier must restrict IT and information access relative to this contract only to its individuals who have been screened and authorized, have been identified and authenticated, and have a "need to know".

In following the 'principle of least-privilege', the Contractor/Supplier must provide only the minimum access required for individuals to perform their duties.

The Contractor/Supplier must withdraw all access privileges relative to this contract from individuals no longer involved.

3.2.4 Cryptography and IT Equipment Security

The electronic storage of up to SECRET information associated with this contract must be within a CISD approved IT environment.

For Protected B information, the Contractor/Supplier must segregate its networks into IT security zones and implement perimeter defence and network security safeguards. CSEC provides the ITSG-38 and ITSG-22 guidelines on this specific subject. As well, the Contractor/Supplier must apply strict control of all access to the protected zone where the information associated with this contract resides. Network perimeter defence safeguards (e.g. firewalls, routers) must be used to mediate all traffic and to protect servers that are accessible from the internet. The Contractor/Supplier must use CSEC approved encryption technology to ensure confidentiality, integrity, authentication and non-repudiation.

For SECRET information, unless the Contractor/Supplier operates and maintains a CSEC approved SECRET network, all equipment used for the fulfilment of this contract must be stand-alone (non-networked) and physically treated as SECRET material. Electronic transmission is strictly forbidden.

The Need-to-Know principle must be applied.

For data at rest, the Contractor/Supplier must use CSEC approved encryption technology. Refer to CSEC ITSB-40A for further information.

3.2.5 Mobile Computing and Teleworking

All processing and storage of SECRET information must be performed within the confines of the CISD approved physical locations for this contract.

3.2.6 Software Integrity and Security Configuration

The Contractor/Supplier should configure the security of their operating systems and application software being used to process up to SECRET information in accordance with security best practices. Safeguards must be implemented to "harden" the IT equipment processing up to SECRET information. For more information on software hardening and configuration best practices, refer to the best practices issued by CSEC, by the National Institute for Standards and Technology (NIST) and by the Center for Internet Security.

3.2.7 Malicious Code

The Contractor/Supplier must ensure that all media is safe from malicious code before connection is made with the SECRET equipment used for this contract. For information up to Protected B, the Contractor/Supplier must install, use and regularly update antivirus software and conduct scans on all electronic files from external systems.

3.3. Detection

It is important to have the ability to detect security related issues within the operating environment. The rigor and extent of detection must be based on a high level of risk. To protect the information associated with this contract and ensure service delivery, the Contractor/Supplier must continuously monitor its operations.

At minimum, the Contractor/Supplier must include a security audit log process.

3.4. Response and Recovery

3.4.1 Incident Response

The Contractor/Supplier must establish mechanisms to respond effectively to IT incidents and exchange incident-related information with the Department immediately. The Contractor/Supplier must have a documented incident response process.

Caution must be used to ensure the protection of SECRET level information confidentiality whenever reporting incidents or issues.

3.4.2 Incident Reporting

It is paramount that the Department is made aware of any security-related incidents with respect to the facilities and equipment used to process and store up to SECRET information associated with this contract.

The Contractor/Supplier must report any security-related incidents to the Department within *one hour* of an incident being detected or reported.

Caution must be used to ensure the protection of SECRET level information confidentiality whenever reporting incidents or issues.

3.4.3 Recovery

Before reconnecting or restoring services, the Contractor/Supplier must ensure that any malicious software has been removed and that there is no potential for recurrence or spread.

With regards to the information associated with this contract, the Contractor/Supplier must:

- Back up the data regularly
- Test backups regularly to ensure that they can be used for recovery
- Back up all software and configuration data
- Facilitate the restoration of data and services by allowing systems to undo operations and return to an earlier state.



- Test restoration procedures regularly to ensure that they are effective and that they can be completed within the time allotted for recovery.
- Determine retention periods for essential business information and archived backups, and
- Ensure that off-site backup storage is within a CISD approved location with CSEC approved encryption is being used.

Note that system recovery should be conducted in a manner that preserves the integrity of evidence, in the event of a criminal investigation of a security breach, for example.

4. CONCLUSION

In absence of a formal TRA, this document has established the Department's basic IT Security requirements for the processing and storage of up to SECRET information.

Through the Canadian Industrial Security Directorate's invaluable input and expertise at certifying that the Contractor/Supplier has met all IT Security requirements, the Department will be reassured that risks have, most likely, been mitigated to acceptable levels.

RECEIVED

MAY 09 2018

File No. 17-164 REVISED (Ticket 140886)



Government of Canada

Gouvernement du Canada

Contract Number / Numéro du contrat
5000033922

Security Classification / Classification de sécurité

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine	Natural Resources Canada	2. Branch or Directorate / Direction générale ou Direction Office of Energy Efficiency
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant
4. Brief Description of Work / Brève description du travail Supplementary Arrangement Umbrella RE: ENERGY ANALYSIS AND DATA COLLECTION SERVICES Economic Analysis and Research (Workstream "D")		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of Information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input checked="" type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada



Government of Canada / Gouvernement du Canada

File No. 17-164 REVISED (Ticket 140886)

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Security Classification / Classification de sécurité

PART A (continued) / PARTIE A (suite)

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC Information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

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

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

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

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

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

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

Special comments:
Commentaires spéciaux :

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

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

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

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

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

PRODUCTION

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

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

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

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

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité

Canada



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

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

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

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

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

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

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