



<p>RETURN BIDS TO: RETOURNER LES SOUMISSIONS À:</p> <p>Bid Receiving - Environment Canada / Réception des soumissions – Environnement Canada</p> <p>Email to: ec.soumissions-bids.ec@canada.ca</p> <p>BID SOLICITATION DEMANDE DE SOUMISSIONS</p> <p>PROPOSAL TO: ENVIRONMENT CANADA</p> <p>We offer to perform or provide to Canada the services detailed in the document including any attachments and annexes, in accordance with the terms and conditions set out or referred to in the document, at the price(s) provided.</p> <p>SOUMISSION À: ENVIRONNEMENT CANADA</p> <p>Nous offrons d'effectuer ou de fournir au Canada, aux conditions énoncées ou incluses par référence dans le document incluant toutes pièces jointes et annexes, les services détaillés dans le document, au(x) prix indiqué(s).</p>	<p>Title – Titre The Contribution of Public Transit and Active Transportation Investments towards Greenhouse Gas Emission Reductions in Canada</p>	
	<p>EC Bid Solicitation No. /SAP No. – N° de la demande de soumissions EC / N° SAP 5000047311</p>	
	<p>Date of Bid solicitation – Date de la demande de soumissions 2019-07-24</p>	
	<p>Bid Solicitation Closes – La demande de soumissions prend fin</p> <p>at – à 2:00 P.M. on – le 2019-08-16</p>	<p>Time Zone – Fuseau Horaire</p> <p>Eastern Daylight Time</p>
	<p>F.O.B – F.A.B Destination.</p>	
	<p>Address Enquiries to - Adresser toutes questions à moufid.samri@canada.ca</p>	
	<p>Telephone No. – N° de téléphone 514-496-2617</p>	<p>Fax No. – N° de Fax 514-283-4439</p>
	<p>Delivery Required – Livraison exigée See Statement of Work herein.</p>	
	<p>Destination of Services / Destination des services See Statement of Work herein.</p>	
	<p>Security / Sécurité There is no security requirement associated with this requirement.</p>	
<p>Vendor/Firm Name and Address - Raison sociale et adresse du fournisseur/de l'entrepreneur</p>		
<p>Telephone No. – N° de téléphone</p>	<p>Fax No. – N° de Fax</p>	
<p>Name and title of person authorized to sign on behalf of Vendor/Firm: (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</p>		
<p>Signature</p>	<p>Date</p>	



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TITLE: The Contribution of Public Transit and Active Transportation Investments towards Greenhouse Gas Emission Reductions in Canada

PART 1 - GENERAL INFORMATION

1. Introduction

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

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

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;

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

Part 5 Certifications: includes the certifications to be provided;

Part 6 Security, Financial Bid and Other Requirements: includes specific requirements that must be addressed by bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Attachments include the Financial Bid Submission Sheet, Mandatory Technical Criteria, and Rated Technical Criteria

The Annexes include the Statement of Work, the Basis of Payment, the Supplier list of names and the Former Public Servant – Competitive Bid Form.

2. Summary

2.1 Environment and Climate Change Canada (ECCC) ECCC would like to engage external experts to improve our understanding of current emissions from public transit and avoided emissions due to public transit and active transportation systems, and improve our ability to forecast future GHG emissions from the transportation sector. The ultimate goal is to be able to forecast the impact of large public transit and active transportation infrastructure investments on modal shift and GHG emissions.

This work would include an investigation of the following key questions, based on a review of the existing academic and professional literature, interviews with experts, and interviews with transit authorities. The period of the contract is **13 weeks from the date of contract award.**

2.2 Bidders must provide a list of names, or other related information as needed, pursuant to section 01 Integrity Provisions of Standard Instructions 2003.



2.3 For services requirements, bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

3. Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

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

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

The 2003 (2019-03-04) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

The standard instructions 2003 are modified as follows:

Under “Text” at 02:

Delete: “Procurement Business Number”

Insert: “Deleted”

At Section 02 Procurement Business Number

Delete: In its entirety

Insert: “Deleted”

At Section 05 Submission of Bids, Subsection 05 (2d):

Delete: In its entirety

Insert: “send its bid only to Environment Canada (EC) as specified on page 1 of the bid solicitation or to the address specified in the bid solicitation;”

At Section 05 Submission of Bids, Subsection 05 (4):

Delete: “sixty (60) days”

Insert: “one hundred and twenty (120) days”

At Section 06 Late Bids:

Delete: “PWGSC”

Insert: “Environment Canada”

At Section 07 Delayed Bids:

Delete: “PWGSC”

Insert: “Environment Canada”

At Section 08 Transmission by Facsimile, Subsection 08 (1):

Delete: In its entirety

Insert: “Bids may be submitted by facsimile if specified in the bid solicitation.”

At Section 12 Rejection of Bid, Subsection 12 (1) a. and b.:

Delete: In their entirety

Insert: “Deleted”



At Section 17 Joint Venture, Subsection 17 (1) b.:

Delete: “the Procurement Business Number of each member of the joint venture,”

Insert: “Deleted”

At Section 20 Further Information, Subsection 20 (2):

Delete: In its entirety

Insert: “Deleted”

1.1 PWGSC SACC Manual Clauses

A7035T (2007-05-25), List of Proposed Subcontractors

If the bid includes the use of subcontractors, the Bidder agrees, upon request from the Contracting Authority, to provide a list of all subcontractors including a description of the things to be purchased, a description of the work to be performed and the location of the performance of that work. The list should not include the purchase of off-the-shelf items, software and such standard articles and materials as are ordinarily produced by manufacturers in the normal course of business, or the provision of such incidental services as might ordinarily be subcontracted in performing the Work.

2. Submission of Bids

Bids must be submitted to Environment and Climate Change Canada (ECCC) at the address and by the date, time and place indicated on page 1 of the bid solicitation.

3. Former Public Servant – Competitive Bid

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 FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada’s request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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



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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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



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

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

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than two (2) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

5. Applicable Laws

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

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

6. Basis for Canada's Ownership of Intellectual Property

Environment Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds:

- **the main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination.**



PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

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

Section I: Technical Bid

(1 electronic copy in PDF format by email to ec.soumissions-bids.ec@canada.ca)

Section II: Financial Bid

(1 electronic copy in PDF format by email to ec.soumissions-bids.ec@canada.ca)

Section III: Certifications

(1 electronic copy in PDF format by email to ec.soumissions-bids.ec@canada.ca)

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

In order to be considered, bids must be received no later than 2:00 P.M. (Eastern Daylight Time) on the date and time indicated on the cover page to herein as the "Closing Date." Bids received after the Closing Date will be considered non-responsive and will not be considered for contract award. Bids submitted by email must be submitted ONLY to the following email address:

Email Address: ec.soumissions-bids.ec@canada.ca

Attention: Moufid Samri

Solicitation Number: 5000047311

Bids sent by fax will not be accepted. Bidders should ensure that their name, address, Closing Date of the solicitation and Solicitation Number are clearly indicated in the body of their email. Bids and supporting information may be submitted in either English or French.

The total size of the email, including all attachments, must be less than **15 megabytes (MB)**. It is each Bidder's responsibility to ensure that the total size of the email does not exceed this limit.

It is important to note that emails systems can experience systematic delays and, at times, large attachments may cause systems to hold or delay transmission of emails. It is solely the Bidder's responsibility to ensure that the Contracting Authority receives a bid on time, in the mailbox that has been identified for bid receipt purposes. Date stamps for this form of transmission are not acceptable.

Section I: Technical Bid

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

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their

bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

Section II: Financial Bid

1.1 Bidders must submit their financial bid in Canadian Funds and in accordance with the "Financial Bid Evaluation and Basis of Payment in Annex B". The total amount of Applicable Taxes must be shown separately. All information relating to price must appear only in the financial bid. No price may be indicated in any other section of the bid. The bid must cover the prescribed length of the contract, including option years.

Bidders must submit their prices FOB destination; Canadian customs duties and excise Taxes included, as applicable; and Applicable Taxes excluded.

1.2 Price Breakdown

In their financial bid, the bidders are requested to provide a detailed breakdown of the price for the following elements of the Work, as applicable:

- (a) Professional fees: For each individual and (or) labour category to be assigned to the Work, the bidders should indicate: i) the firm hourly rate or the firm daily rate, inclusive of overhead and profit; and ii) the estimated number of hours or days, as applicable. The bidders should indicate the number of hours in one working day. The professional fees must include the total estimated cost of all travel and living expenses that may need to be incurred.
- (b) Travel and Living Expenses (if applicable): The bidders should indicate the number of trips and the number of days for each trip, the cost, destination and purpose of each journey, together with the basis of these costs without exceeding the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the *National Joint Council Travel Directive* and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".
- (c) Subcontracts (if applicable): The bidders should identify all of the proposed subcontractors and provide in their financial bid for each one a price breakdown.
- (d) Applicable Taxes: The bidders should indicate the Applicable Taxes separately.

1.3 Bidders should include the following information in their financial bid:

- (a) Their legal name; and
- (b) The name of the contact person (including this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid; and any contract that may result from their bid.

Section III: Certifications

Bidders must submit the certifications required under Part 5.



**PIÈCE JOINTE 01 DE LA PARTIE 3
FEUILLE DE PRÉSENTATION DE LA SOUMISSION FINANCIERE**

The Bidder should complete the Financial Bid Presentation Sheet and include it in its financial bid. As a minimum, the Bidder must respond to the Financial Bid Presentation Sheet in its financial bid by including, for each of the tasks identified below, the all-inclusive fixed rate (in CAD) that it proposes for each of the resource categories identified.

Deliverables	Tiemframe	Amount
Planning and Data Collection	Octobre 2019	\$
Submission of the preliminary report	Novembre 2019	\$
Submission of the final report	Décembre 2019	\$
Total cost (excluding GST / HST). Financial Bid Evaluation Point		\$

Breakdown of the financial proposal

Resources	Number of working days	Rate	Totals
Project Team			
Manager Project		\$	\$
		\$	\$
		\$	\$
		\$	\$
Total			\$

PART 4 - EVALUATION PROCEDURES, TECHNICAL AND FINANCIAL BID EVALUATION CRITERIA, AND BASIS OF SELECTION

1. Evaluation Procedures

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

1.1 Technical Evaluation

Unless expressly stated otherwise, the experience described in the bid must be that of the bidder itself (with the experience of any company that has trained the bidder by way of merger, but without the experience gained from purchasing assets or awarding contracts). The experience of the companies related to the tenderer (parent company, subsidiary or sister), subcontractors and suppliers is not taken into consideration

Mandatory Technical Criteria and Point Rated Technical Criteria are included in Attachment 01 to Part 4.

1.2 Evaluation Process

All bids will be evaluated in accordance with the process outlined in this Article.

The Evaluation Process and Contractor Selection are subdivided into four stages:

- i. Evaluation of compliance with the Mandatory Technical Evaluation Criteria
- ii. Evaluation of the Point-Rated Technical Evaluation Criteria
- iii. Evaluation of the Financial Bid
- iv. Basis of Selection of the winning bidder

Bidders will not be given any information regarding the status of their bid, any preliminary scores or results relating thereto, or any similar details until such time as the evaluation of all bids has been completed and a Contract has been awarded.

Notwithstanding that the evaluation and selection methodology will be conducted in Stages, the fact that Canada has proceeded to any next stage shall not be deemed to mean that Canada has conclusively determined that the proposal has successfully passed all the previous Stages.

1.3 Evaluation of the Financial Bid

Once the technical evaluation scores are established for all bids, the Financial Bid will be opened and evaluated by the Contracting Authority. The technical scores will not be changed once the financial bids are opened.

The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.

The Total Bid Price for Evaluation will be determined in accordance with Attachment 01 to Part 3, Financial Bid Presentation Sheet. Bidders must complete all the fields on the Financial Bid Presentation Sheet for their bids to be considered responsive.

Note: a cell cannot remain blank. If an amount of \$0.00 or NIL is provided in the Bid for a portion of the Work, the Bidder must understand that all related work must be performed for the dollar value indicated in the Bid (i.e. \$0).

Failure to complete the Financial Bid Presentation Sheet in accordance with the instructions above will render the Bidder's bid non-responsive.

2. Basis of Selection

Highest combination of technical merit (70%) and Price (30%)

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

- (a) To be declared responsive, a bid must:
 - (i) comply with all the requirements of the bid solicitation;
 - (ii) meet all mandatory technical evaluation criteria; and
 - (iii) obtain the required **minimum of 70 points** overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 100 points;
- (b) Bids not meeting (i) or (ii) or (iii) will be declared non-responsive.
- (c) The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
- (d) To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained will be divided by maximum number of points available multiplied by the ratio of 70%.
- (e) To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
- (f) For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- (g) Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The sum of the technical and financial scores is used to determine the final score. The contract will be awarded to the firm obtaining the highest overall score. Where several bids are equal, the one with the highest technical rating will be selected.

$$\text{Technical Score} = \text{Bidder's Points} \times 70\% = \text{XXX}$$



100

$$\text{Financial Score} = \frac{\text{Lowest Bid}}{\text{Bidder's Cost}} \times 30\% = \text{XXX}$$

$$\text{Total Score} = \text{Technical Score} + \text{Financial Score}$$

Example of calculation

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		182/260	200/260	225/260
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$182/260 \times 70 = 49$	$200/260 \times 70 = 53.85$	$225/260 \times 70 = 60.58$
	Pricing Score	$45/55 \times 30 = 24.55$	$45/50 \times 30 = 27$	$45/45 \times 30 = 30$
Combined Rating		73.55	80.85	90.58
Overall Rating		3rd	2nd	1st



**ATTACHMENT 01 TO PART 4
MANDATORY TECHNICAL CRITERIA AND RATED TECHNICAL CRITERIA**

STRUCTURE OF SUBMISSION

The Bidder is expected to submit their proposal in the following format.

Section	Mandatory Criteria	Rated Criteria	Maximum Score (/100)
1. Project Manager	M1	R1	/15
2. Project Team	M2	R2	/20
3. Technical Proposal	M3		
3.1 Objectives, Scope and Policy Background	M3(a)	R3	/10
3.2 Work Plan	M3(b)	R4	/20
3.3 Research and Data Collection Methodology	M3(c)	R5.1, R5.2	/35

1.1 MANDATORY EVALUATION CRITERIA

The Mandatory Criteria listed below will be evaluated on a simple pass/fail basis. Proposals, which fail to meet the mandatory criteria, will be deemed non-responsive.

Item	Mandatory Criteria	Proposal Page #	Met/ Not Met
M1	<p>Identification of Project Manager In the <i>Project Manager</i> section of its proposal, the Bidder must propose a qualified Project Manager and include the CV of the Project manager.</p> <p>The CV must include details demonstrating that the Project manager has acted as project manager on at least one project similar in nature to that of the project outlined in the Statement of Work (SoW) found at Annex A.</p>		
M2	<p>Identification of Project Team In the <i>Project Team</i> section of its proposal, the Bidder must propose a qualified project team which includes</p> <ul style="list-style-type: none"> a) a list of team members (including subcontractors, as applicable) b) their roles and responsibilities on the project c) CVs of all proposed team members <p>Please note that the project manager may also be identified as a member of the project team. Please also note that the project team may also include only a single member.</p>		



M3	<p>Technical Proposal</p> <p>In the <i>Technical Proposal</i> section of its proposal, the Bidder must submit a technical proposal which must at minimum include:</p> <ul style="list-style-type: none"> a) objectives, scope and policy background b) detailed work plan including milestones, timeline, and which tasks will be assigned to specific team members c) methodology for research and data collection 		
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1.2 EVALUATION OF RATED CRITERIA

The criteria contained herein will be used by ECCC to evaluate each proposal that has met all of the mandatory criteria listed above.

Proposals will be evaluated based on the following criteria:

Item	Rated Criteria	Maximum Score
R1	<p>Qualifications of Project Manager</p> <p>In the <i>Project Manager</i> section of its proposal, the Bidder should demonstrate that the proposed project manager has led projects that involved any of these two target activities:</p> <ul style="list-style-type: none"> a) data collection and analysis, or b) emissions modeling <p>in any of these three policy fields:</p> <ul style="list-style-type: none"> i) public transit ii) active transportation, or iii) urban transportation <p>The Bidder should demonstrate this leadership experience by providing a list of projects of contract value greater than or equal to \$50,000 CAD for which the project manager has led. For each project in the list, the Bidder should provide a summary not exceeding one page in length that includes the following:</p> <ul style="list-style-type: none"> • a description of the project • the contract value of the project • a description of the degree of data collection and analysis and/or emissions modeling that was conducted during the project and in which of the three fields (public transit, active transportation or urban transportation) this work was conducted <p>Each of these project summaries will be evaluated to</p>	15



Item	Rated Criteria	Maximum Score
	<p>demonstrate the project manager’s leadership experience. 3 points will be awarded per project summary as follows to a maximum of 15 points:</p> <p>0: No leadership experience in either of the two target activities for any of the three policy areas demonstrated by the project manager for the identified project</p> <p>3: Leadership experience in either of the two target activities for any of the three policy areas demonstrated by the project manager for the identified project</p>	
R2	<p>Qualification of Project Team In the <i>Project Team</i> section of its proposal, the Bidder should demonstrate that the proposed team members have significant experience in research and data analysis of the following five subject areas:</p> <ul style="list-style-type: none"> • Public transit (4 points) • Modeling of transportation GHG emissions, particularly MOVES (4 points) • Active transportation (4 points) • Drivers of public transit and active transportation demand (4 points) • Modal shift in personal transportation (4 points) <p>The Bidder should demonstrate the research and data analysis experience of their proposed project team by providing summaries of each project that proposed team members have worked on that include work in the five subject areas listed above.</p> <p>Each of these summaries should include the following:</p> <ul style="list-style-type: none"> • a description of the project • the contract value of the project • the list of team members who were involved with the project • a description of each team member’s contribution to the project and how this contribution connects to the five target subject areas listed above <p>Each project summary should not exceed two pages in length and must not include projects with a contract value of less</p>	20



Item	Rated Criteria	Maximum Score
	<p>than \$50,000 CAD.</p> <p>Points will be awarded as follows to a maximum of 20 points:</p> <ul style="list-style-type: none"> 0: Significant experience from team members in none of these five subject areas 4: Significant experience from team members in one of these five subject areas 8: Significant experience from team members in two of these five subject areas 12: Significant experience from team members in three of these five subject areas 16: Significant experience from team members in four of these five subject areas 20: Significant experience from team members in five of these five subject areas 	
R3	<p>Understanding of Objectives, Scope and Policy Background</p> <p>The Bidder should demonstrate a thorough understanding of the project’s objectives, scope and the relevant policy issues involved in the <i>Objectives, Scope and Policy Background</i> section in its proposal.</p> <p>The demonstrated understanding of the objectives, scope and policy background will be awarded points as follows:</p> <ul style="list-style-type: none"> 0: Not addressed 2: Not evident: incorrect understanding of objectives, scope and policy background 4: Inadequate: poor understanding of objectives, scope and policy background. Incomplete, imprecise or lacking any evidence of understanding 6: Adequate: complete and correct understanding of objectives, scope and policy background but without any additional insights 8: Good: complete and correct understanding of objectives, scope and policy background with some additional insights that demonstrate a more complete understanding of the objectives 10: Excellent: complete and correct understanding of objectives, scope and policy background with significant added insights that demonstrate the 	10



Item	Rated Criteria	Maximum Score
	completeness of understanding of the objectives	
R4	<p>Work Plan The Bidder should demonstrate a thorough understanding of the logistical requirements to conduct the project successfully. The Bidder should demonstrate this understanding by defining an work plan in the <i>Work Plan</i> section that is clear, detailed, reasonable and feasible.</p> <p>This work plan should outline how the Bidder will meet the overall objectives of the project, identify key milestones and timelines, and describe its specific approach to accomplish each of the individual tasks contained in the Statement of Work.</p> <p>The work plan will be awarded points as follows:</p> <ul style="list-style-type: none"> 0: Not addressed 4: Not evident: incorrect understanding of the logistical requirements needed to complete the project 8: Inadequate: poor understanding of the logistical requirements needed to complete the project. Incomplete, imprecise or lacking any evidence of understanding 12: Adequate: basic understanding of the logistical requirements needed to complete the project 16: Good: thorough understanding of the logistical requirements needed to complete the project 20: Excellent: detailed and compelling understanding of the logistical steps needed to complete the project 	20
R5	<p>Research and Data Collection Methodology The Bidder should clearly indicate the methodology it will use to conduct research and collect data in the <i>Research and Data Collection Methodology</i> section.</p>	35
R5.1	<p>Methodological Approach In the <i>Research and Data Collection Methodology</i> of its proposal, the Bidder should outline its methodology in clear, logical steps for each of the five elements identified in the Scope of Work section of the Statement of Work (A – E), including:</p> <ul style="list-style-type: none"> A. Data on current public transit systems (5 points) 	25



Item	Rated Criteria	Maximum Score
	<p>B. GHG emission projection modelling (5 points)</p> <p>C. Urban active transportation information (5 points)</p> <p>D. Drivers of public transit and active transportation demand (5 points)</p> <p>E. Estimating modal shift from private cars to public transit and/or active transportation (5 points)</p> <p>Points will be awarded as follows for each of the five elements in the Scope of Work section of the Statement of Work up to a maximum of five points:</p> <p>0: Not provided</p> <p>1: Not evident: insufficient or incorrect information provided</p> <p>2: Inadequate: incomplete, vague or lacking evidence of understanding</p> <p>3: Adequate: complete, realistic and achievable within the available time and resources</p> <p>4: Good: complete and realistic, logical and straightforward</p> <p>5: Excellent: comprehensive strategy that provides a logical pathway from start to finish. Thoughtful consideration of details that will achieve all objectives</p>	
R5.2	<p>Obstacles, Problems and Quality Control</p> <p>In the <i>Research and Data Collection Methodology</i> of its proposal, the Bidder should address potential obstacles or problems that may arise during this phase of the project and articulate the Bidder's strategy for addressing these obstacles or problems and maintain quality control</p> <p>Points will be awarded as follows</p> <p>0: Not addressed</p> <p>2: Not evident: little indication of recognition of problems and solutions</p> <p>4: Inadequate: vague or incomplete recognition of problems and solutions</p> <p>6: Adequate: complete and correct recognition of problems but with limited detail on solutions</p> <p>8: Good: complete and correct recognition of problems and solutions, demonstrating a solid understanding of each issue</p> <p>10: Excellent: comprehensive recognition of problems</p>	10



Item	Rated Criteria	Maximum Score
	and solutions, demonstrating thoughtful consideration of primary and secondary details	
Total Available Points		100
Minimum Pass Mark		70



PART 5 - CERTIFICATIONS

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

The certifications provided by bidders to Canada are subject to verification by Canada at all times. Canada will declare a bid non-responsive, or will declare a contractor in default in carrying out any of its obligations under the Contract, if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

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

1. Certifications Required Precedent to Contract Award

1.1 Integrity Provisions - Associated Information

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

2. Additional Certifications Required Precedent to Contract Award

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

2.1 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. Failure to comply with the request may result in the bid being declared non-responsive.

2.2 Education and Experience

PWGSC SACC Manual clause A3010T (2010-08-16) Education and Experience

PART 6 – INSURANCE REQUIREMENTS

1. Insurance - No Specific Requirement

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.



PART 7 - RESULTING CONTRACT CLAUSES

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

Title: The Contribution of Public Transit and Active Transportation Investments towards Greenhouse Gas Emission Reductions in Canada.

1. Statement of Work

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

2. Standard Clauses and Conditions

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

2.1 General Conditions

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

General conditions 2010B is modified as follows:

At Section 12 Transportation Costs

Delete: In its entirety

Insert: "Deleted"

At Section 13 Transportation Carriers' Liability

Delete: In its entirety.

Insert: "Deleted"

At Section 18, Confidentiality:

Delete: In its entirety

Insert: "Deleted"

Insert Subsection: "35 Liability"

"The Contractor is liable for any damage caused by the Contractor, its employees, subcontractors, or agents to Canada or any third party. Canada is liable for any damage caused by Canada, its employees or agents to the Contractor or any third party. The Parties agree that no limitation of liability or indemnity provision applies to the Contract unless it is specifically incorporated in full text in the Articles of Agreement. Damage includes any injury to persons (including injury resulting in death) or loss of or damage to property (including real property) caused as a result of or during the performance of the Contract."

3. Security Requirement

3.1 There is no security requirement applicable to this Contract.



4. Term of Contract

4.1 Period of the Contract

The period of the Contract is from date of Contract to **December 19, 2019 inclusive.**

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Moufid Samri
Procurement Specialist
Environment and Climate Change Canada
105 McGill, 5th Floor, Montreal QC H2Y 2E7
Telephone: 514-496-2617
Facsimile: 514-283-4439
Email address: Moufid.samri@canada.ca

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

5.2 Technical Authority

The Technical Authority for the Contract is:

(It will be inserted at contract award.)

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

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

5.3 Contractor's Representative

The Contractor's Representative for the Contract is:

(It will be inserted at contract award.)



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

6. Proactive Disclosure of Contracts with Former Public Servants

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

7. Payment

7.1 Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price of \$ _____ (*the amount will be inserted at contract award*). Customs duties are included and Applicable Taxes are extra.

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

7.2 PWGSC SACC Manual Clauses

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

7.3 Time Verification

C0705C (2010-01-11) Time Verification

8. Invoicing Instructions

8.1 Milestone Payments

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

- (a) an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada;
- (c) all such documents have been verified by Canada;



- (d) all work associated with the milestone and as applicable any deliverable required have been completed and accepted by Canada.

9. Certifications

9.1 Compliance

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

10. Applicable Laws

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

11. Priority of Documents

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

- (a) the Articles of Agreement;
- (b) 2010B General Conditions - Professional Services (Medium Complexity) (2018-06-21) as modified;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Supplier list of names
- (f) Annex D, Former Public Servant – Competitive Bid Form
- (g) the Contractor's bid dated _____, as clarified on _____ or as amended on _____. (*Will be inserted at contract award.*)



ANNEX A STATEMENT OF WORK

The Contribution of Public Transit and Active Transportation Investments towards Greenhouse Gas Emission Reductions in Canada

Background

Environment and Climate Change Canada (ECCC) is seeking to enhance understanding of the role that improvements to public transit and active transportation systems¹ could play in reducing greenhouse gas (GHG) emissions across Canada in the 2018-2030 and 2030-2050 timeframes.

The transportation sector (excluding pipelines) was responsible for approximately 25% of Canada's energy-related GHG emissions in 2016, with the majority of emissions occurring within urban areas. It is understood that well-designed and well-used urban public transit systems and active transportation infrastructure have the potential to reduce GHG emissions by encouraging a shift to less GHG emissions-intensive modes of transportation. However, this potential is influenced by many variables, including land use planning, urban density, relative cost, convenience and reliability of public transit compared to personal transportation options, and other factors.

Scope of Work

ECCC would like to engage external experts to improve our understanding of current emissions from public transit and avoided emissions due to public transit and active transportation systems, and improve our ability to forecast future GHG emissions from the transportation sector. The ultimate goal is to be able to forecast the impact of large public transit and active transportation infrastructure investments on modal shift and GHG emissions.

This work would include an investigation of the following key questions, based on a review of the existing academic and professional literature, interviews with experts, and interviews with transit authorities.

- A. **Data on current public transit systems:** What are the size and scope of current public transit systems in Canada's five most populous cities, and three mid-sized cities (with populations between 300,000 and 500,000)? What is the level of investment in these systems in the past 10 years, for infrastructure and for equipment? How many riders do these systems currently have, what distance do they travel, and how has ridership changed over the past 10 years? What is the share of traffic (both ridership and distance travelled) occurring during peak morning and afternoon hours? What is the capacity utilization rates of the current systems? How much and what type (diesel, natural gas, electric) of fuel do these systems consume, and at what rate do they produce GHG emissions, measured

¹ Public transit includes e.g., buses, trains, subways, light rail and streetcars, but does not include inter-city public transit. Active transportation includes any form of human-powered travel – most commonly walking and cycling.



in carbon dioxide equivalent per km (CO₂eq/km)? As part of this calculation, please include GHG emissions that would be expected from electricity generation (e.g. coal-fired electricity generation). What infrastructure investments are planned, what level of electrification has been committed, what are the projected ridership rates for each of these cities, and have impacts of investments on GHG emissions been assessed? What are the projected ridership rates to 2030 for each of the eight transit systems (and if available, each province and territory)? What is the projected modal share to 2030 for each of the eight transit systems (and if available, each province and territory)?

- B. **GHG emission projection modelling:** Is MOVES2-ready historical data on public transit available for the eight sample cities? If available, what are the key data sets and how can they be accessed?
- C. **Urban active transportation information:** what information is available on active transportation use, existing active transportation infrastructure (i.e., bike lanes/paths), investments in active transportation infrastructure, its relationship with public transit, and other active transportation promotion/support programs in Canada?
- D. **Drivers of public transit and active transportation demand:** What are the key factors that influence the extent to which people take public transit and/or active transportation over other forms of transportation? In which cities is transit ridership lowest and highest in Canada, and what are the key reasons for this? What obstacles are preventing more Canadians from using public transit? Similarly, where are active transportation rates lowest and highest and what are key drivers (e.g., quality of infrastructure, traffic congestion, weather)? How do transit providers within Canada think about and plan for the future, including projected demand for transit? What government interventions (federal, provincial, territorial, municipal) have been most successful in influencing these key factors?
- E. **Estimating modal shift from private cars to public transit and/or active transportation:** What are the principal existing methodologies for estimating modal shift from private cars towards public transit and/or active transportation? Which factors should these methodologies consider (e.g., changes to transit infrastructure and routes, changes to relative costs of transit and private vehicles, other policies such as congestion pricing)? What are the strengths and limitations of each methodology? What, if any, generalized approaches exist that can be used for the purposes of estimating modal shift and GHG emissions reductions per dollar of transit infrastructure and/or operational investments, or other programming?

² MOVES is a transportation GHG projection model. MOVES-ready data would have the following elements: year, province, city, mode, class, fuel, fuel unit, emission control technology, fuel used, population, vehicle kilometers travelled, passenger kilometers travelled, fuel consumption rate.



Key Deliverables

- 1) Proposed research plan and draft report outline: to be discussed at an initial scoping meeting (in person or teleconference) to confirm the contractor's understanding of project goals and clarify any research questions. (One week following Date of Award)
- 2) Draft report responding to the key questions outlined above, summarizing the current state of research/academic literature and professional practice in this area. By this point, the data requested under key questions A, B, and C should be collated and available for review. The draft report will be discussed in one or more report feedback meetings (in person or via teleconference). (Nine weeks following Date of Award)
- 3) Data sets obtained from transit authorities, research, experts, etc. Interview notes for all interviews conducted as part of the project. Final report responding to key questions outlined above, as refined in scoping and report feedback meetings. (12 weeks following Date of Award)
- 4) Presentation of final report to ECCC in person or via teleconference. (13 weeks following Date of Award)

Duration of Contract

13 weeks following Date of Award

Deliverables and schedule

- 1) One week following Date of Award: initial scoping meeting and presentation of proposed research plan
- 2) One to nine weeks following Date of Award: research and conduct interviews. Host bi-weekly meetings to provide updates on research progress
- 3) Nine weeks following Date of Award: draft report
- 4) 10 weeks following Date of Award: feedback meetings
- 5) 12 weeks following Date of Award: final report
- 6) 13 weeks following Date of Award: final report presentation

Report Delivery Format

Word and PDF format.

Official Language

Work can be done in French or English. Reports to be submitted must be in English.



**ANNEX B
BASIS OF PAYMENT**

The Bidder must complete the financial evaluation criteria table provided below for the period of the contract.

The price of the bid will be evaluated in Canadian dollars, before Goods and Services Tax or Harmonized Sales Tax, FOB destination, Canadian customs duties and excise taxes included.

Deliveribles	Tiemframe	Percentage of Payment
Preliminaty Report	November 2019	\$ _____
Final Report	December 2019	\$ _____
Total Cost (GST/HST excluded)		\$ _____



**ANNEX C
SUPPLIER LIST OF NAMES**

Environment and Climate Change Canada has endorsed the Integrity Regime developed and implemented by Public Services and Procurement Canada. By submitting a quote, Contractors agree to comply with the provisions of the Integrity Regime and [Ineligibility and Suspension Policy](#) as well as the [Code of Conduct for Procurement](#). / Environnement et Changement climatique Canada a adopté le régime d'intégrité développé et mis en place par Services publics et Approvisionnement Canada. Les fournisseurs acceptent, en soumettant une proposition, de se conformer aux dispositions du régime d'intégrité et la [Politique d'inadmissibilité et de suspension](#) ainsi que le [Code de conduite pour l'approvisionnement](#).

In accordance with the PWGSC (now PSPC) [Ineligibility and Suspension Policy](#), the following information is to be provided when bidding or contracting.³ / Selon la [Politique d'inadmissibilité et de suspension](#) de TPSGC (maintenant SPAC), les renseignements suivants doivent être fournis lors d'une soumission ou de la passation d'un marché.³

*** Mandatory Information / Informations obligatoires**

* Complete Legal Name of Company / Dénomination complète de l'entreprise	
* Operating Name / Nom commercial	
* Company's address / Adresse de l'entreprise	* Type of Ownership / Type d'entreprise
	<input type="checkbox"/> Individual / Individuel <input type="checkbox"/> Corporation / Corporation <input type="checkbox"/> Joint-Venture / Coentreprise
* Board of Directors⁴ / Membres du conseil d'administration⁴ (Or provide the list as an attachment / Ou mettre la liste en pièce-jointe)	
First name / Prénom Last Name / Nom	Position (if applicable) / Position (si applicable)



¹ **List of names:** All suppliers, regardless of their status under the Policy, must submit the following information when participating in a procurement process:

- suppliers that are corporate entities, including those bidding as joint ventures, must provide a complete list of the names of all current directors or, for a privately owned corporation, the names of the owners of the corporation;
- suppliers bidding as sole proprietors, including sole proprietors bidding as joint ventures, must provide a complete list of the names of all owners; or
- suppliers that are a partnership do not need to provide a list of names.

² Board of Governors /Conseil des gouverneurs; Board of Managers /Conseil de direction; Board of Regents /Conseil de régents; Board of Trustees / Conseil de fiducie; Board of Visitors /Comité de réception

Liste des noms: Tous les fournisseurs, peu importe leur situation au titre de la Politique, doivent présenter les renseignements ci-dessous au moment de prendre part à un processus d'approvisionnement:

- les fournisseurs constitués en personne morale, y compris ceux qui présentent une soumission à titre de coentreprise, doivent fournir la liste complète des noms de tous les administrateurs actuels ou, dans le cas d'une entreprise privée, des propriétaires de la société;
- les fournisseurs soumissionnant à titre d'entreprise à propriétaire unique, y compris ceux soumissionnant en tant que coentreprise, doivent fournir la liste complète des noms de tous les propriétaires;
- les fournisseurs soumissionnant à titre de société en nom collectif n'ont pas à soumettre une liste de noms.



ANNEX D FORMER PUBLIC SERVANT – COMPETITIVE BID FORM

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 FPS, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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



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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

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

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

Name and Signature

Date