



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

**PWGSC/TPSGC Acquisitions Bid Receiving
Box/Boîte de Réception des Soumissions
Bid Receiving Box/Boîte de Récepti
1st Floor/Lière étage, Suite 1212
100-1045 Main Street
Moncton
New Brunswick
E1C 1H1
Bid Fax: (506) 851-6759**

**Request For a Standing Offer
Demande d'offre à commandes**

Regional Individual Standing Offer (RISO)
Offre à commandes individuelle régionale (OCIR)

Canada, as represented by the Minister of Public Works and
Government Services Canada, hereby requests a Standing Offer
on behalf of the Identified Users herein.

Le Canada, représenté par le ministre des Travaux Publics et
Services Gouvernementaux Canada, autorise par la présente,
une offre à commandes au nom des utilisateurs identifiés
énumérés ci-après.

Comments - Commentaires

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

Issuing Office - Bureau de distribution
Acquisitions NB/PEI (Moncton Office) – Bureau
d'acquisitions N.-B./Î.-P.-É. (Moncton)
1045 Main Street / 1045, rue Main
Moncton
New Bruns
E1C 1H1

Title - Sujet RISO Biological Specimen Collection	
Solicitation No. - N° de l'invitation F5240-190020/A	Date 2019-08-12
Client Reference No. - N° de référence du client F5240-190020	GETS Ref. No. - N° de réf. de SEAG PW-\$MCT-033-5604
File No. - N° de dossier MCT-9-42017 (033)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2019-08-28	
Time Zone Fuseau horaire Atlantic Daylight Saving Time ADT	
Delivery Required - Livraison exigée See Herein	
Address Enquiries to: - Adresser toutes questions à: Young (MCT), Leesa	Buyer Id - Id de l'acheteur mct033
Telephone No. - N° de téléphone (506)871-1716 ()	FAX No. - N° de FAX (506)851-6759
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: FISHERIES AND OCEANS CANADA ST. ANDREWS BIOLOGICAL STATION 125 Marine Science Drive ST ANDREWS New Brunswick E5B0E4 Canada	
Security - Sécurité This request for a Standing Offer does not include provisions for security. Cette Demande d'offre à commandes ne comprend pas des dispositions en matière de sécurité.	

Instructions: See Herein

Instructions: Voir aux présentes

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

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PART 1 - GENERAL INFORMATION

1.1 Introduction

The Request for Standing Offers (RFSO) is divided into seven parts plus attachments and annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Offeror Instructions: provides the instructions applicable to the clauses and conditions of the RFSO;
- Part 3 Offer Preparation Instructions: provides Offerors with instructions on how to prepare their offer 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 offer, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Insurance Requirements: includes specific requirements that must be addressed by Offerors; and
- Part 7 7A, Standing Offer, and 7B, Resulting Contract Clauses:
 - 7A, includes the Standing Offer containing the offer from the Offeror and the applicable clauses and conditions;
 - 7B, includes the clauses and conditions which will apply to any contract resulting from a call-up made pursuant to the Standing Offer.

The Annexes include the Statement of Requirement, the Basis of Payment, the Electronic Payment Instruments, the Federal Contractors Program for Employment Equity – Certification, Evaluation Criteria and any other annexes

1.2 Summary

1.2.1 Requirement:

The Department of Fisheries and Oceans Canada (DFO) occasionally requires scientific services requiring a high level of taxonomic expertise in a broad range of marine animal taxa, usually in the context of specific research projects. These services are provided by taxonomists, aquatic biologists, technicians, etc.

1.2.2 Location of work:

St. Andrews, New Brunswick

1.2.3 Period of Standing Offer:

From Date of Award to March 31, 2023 with two one-year options to renew.

1.2.4 Number of Standing offers to be issued:

One (1) standing offer will be issued.

1.2.5 Trade Agreements:

The requirement is subject to a preference for Canadian services.

1.2.6 Epost Connect service

This RFSO allows offerors to use the epost Connect service provided by Canada Post Corporation to transmit their offers electronically. Offerors must refer to Part 2 of the RFSO entitled Offeror Instructions and Part 3 of the RFSO entitled Offer Preparation Instructions, for further information on using this method."

1.3 Security Requirements

There are security requirements associated with the requirement of the Standing Offer. For additional information, see Part 6 - Security, Financial and Insurance Requirements, and Part 7 - Standing Offer and Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, offerors 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

Offerors may request a debriefing on the results of the request for standing offers process. Offerors should make the request to the Standing Offer Authority within 15 working days of receipt of the results of the request for standing offers process. The debriefing may be in writing, by telephone or in person.

1.5 Anticipated migration to an e-Procurement Solution (EPS)

Canada is currently developing an online EPS for faster and more convenient ordering of goods and services. In support of the anticipated transition to this system and how it may impact any resulting Standing Offer that is issued under this solicitation, refer to 7.15 Transition to an e-Procurement Solution (EPS).

The Government of Canada's [press release](#) provides additional information.

1.6 Phased Bid Compliance Process

The Phased Bid Compliance Process applies to this requirement.

PART 2 - OFFEROR INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the Request for Standing Offers (RFSO) 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.

Offerors who submit an offer agree to be bound by the instructions, clauses and conditions of the RFSO and accept the clauses and conditions of the Standing Offer and resulting contract(s).

Solicitation No. - N° de l'invitation
F5240-190020/A
Client Ref. No. - N° de réf. du client
F5240-190020/A

Amd. No. - N° de la modif.
File No. - N° du dossier
MCT-9-42017

Buyer ID - Id de l'acheteur
MCT033
CCC No./N° CCC - FMS No./N° VME

The [2006](#) (2019/03/04) Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the RFSO.

Subsection 5.4 of [2006](#), Standard Instructions - Request for Standing Offers - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days
Insert: 120 days

2.1.1 SACC Manual Clauses

SACC Reference	Section	Date
M0019T	Firm Price and/or Rates	2007/05/25

2.2 Submission of Offers

Offers must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated in the RFSO.

PWGSC Acquisitions, Bid Receiving Box
1st Floor, Suite 1212
100-1045 Main Street
Moncton, NB E1C 1H1

Email: TPSGC.RARceptionSoumisNBPE-ARBidReceivingNBPE.PWGSC@tpsgc-pwgsc.gc.ca

Note: Offers will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instruction [2006](#), or to send offers through an epost Connect message if the bidder is using its own licensing agreement for epost Connect."

Facsimile number: (506) 851-6759

2.3 Former Public Servant

Former Public Servant - Competitive - Offer

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, offerors must provide the information required below before the issuance of a standing offer. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of offers is completed, Canada will inform the Offeror 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 offer 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 Offeror a FPS in receipt of a pension? **YES** () **NO** ()

If so, the Offeror 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, Offerors agree that the successful Offeror'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 Offeror a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **YES** () **NO** ()

If so, the Offeror must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;

-
- f. period of lump sum payment including start date, end date and number of weeks;
 - g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

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

2.4 Enquiries - Request for Standing Offers

All enquiries must be submitted in writing to the Standing Offer Authority no later than five (5) calendar days before the Request for Standing Offers (RFSO) closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in **New Brunswick**.

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

PART 3 - OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

- If the Offeror chooses to submit its offer electronically, Canada requests that the Offeror submits its offer in accordance with section 08 of the 2006 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation. The offer must be gathered per section and separated as follows:

- Section I: Technical Offer
- Section II: Financial Offer
- Section III: Certifications
- Section IV: Additional Information

- If the Offeror chooses to submit its offer in hard copies, Canada requests that the Offeror provides its offer in separately bound sections as follows:

- Section I: Technical Offer (two (2) hard copies)
- Section II: Financial Offer (one (1) hard copies)
- Section III: Certifications (one (1) hard copies)

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

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

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

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

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

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

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

Section I: Technical Offer

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

Section II: Financial Offer

Offerors must submit their financial offer in accordance with the Annex B, Basis of Payment.

3.1.1 Electronic Payment of Invoices - Offer

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

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

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

3.1.2 Exchange Rate Fluctuation

C3011T (2013/11/06), Exchange Rate Fluctuation,

Section III: Certifications Offerors must submit the certifications and additional information required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Offers will be assessed in accordance with the entire requirement of the Request for Standing Offers including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the offers.
- (c) The evaluation team will determine first if there are two or more offers with a valid Canadian Content certification. In that event, the evaluation process will be limited to the offers with the certification; otherwise, all offers will be evaluated. If some of the offers with a valid certification are declared non-responsive, or are withdrawn, and less than two responsive offers with a valid certification remain, the evaluation will continue among those offers with a valid certification. If all offers with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other offers received will be evaluated.
- (d) Canada will use the Phased Bid Compliance Process described below.

4.1.1 Phased Bid Compliance Process

4.1.1.1 (2018-07-19) General

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

THE BIDDER ACKNOWLEDGES THAT THE REVIEWS IN PHASE I AND II OF THIS PBCP ARE PRELIMINARY AND DO NOT PRECLUDE A FINDING IN PHASE III THAT THE BID IS NON-RESPONSIVE, EVEN FOR MANDATORY

REQUIREMENTS WHICH WERE SUBJECT TO REVIEW IN PHASE I OR II AND NOTWITHSTANDING THAT THE BID HAD BEEN FOUND RESPONSIVE IN SUCH EARLIER PHASE. CANADA MAY DEEM A BID TO BE NON-RESPONSIVE TO A MANDATORY REQUIREMENT AT ANY PHASE.

THE BIDDER ALSO ACKNOWLEDGES THAT ITS RESPONSE TO A NOTICE OR A

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

- (c) Canada may, in its discretion, request and accept at any time from a Bidder and consider as part of the Bid, any information to correct errors or deficiencies in the Bid that are clerical or administrative, such as, without limitation, failure to sign the Bid or any part or to checkmark a box in a form, or other failure of format or form or failure to acknowledge; failure to provide a procurement business number or contact information such as names, addresses and telephone numbers; inadvertent errors in numbers or calculations that do not change the amount the Bidder has specified as the price or of any component thereof that is subject to evaluation. This shall not limit Canada's right to request or accept any information after the bid solicitation closing in circumstances where the bid solicitation expressly provides for this right. The Bidder will have the time period specified in writing by Canada to provide the necessary documentation. Failure to meet this deadline will result in the Bid being declared non-responsive.
- (d) The PBCP does not limit Canada's rights under Standard Acquisition Clauses and Conditions (SACC) 2003 (2019-03-04) Standard Instructions – Goods or Services – Competitive Requirements nor Canada's right to request or accept any information during the solicitation period or after bid solicitation closing in circumstances where the bid solicitation expressly provides for this right, or in the circumstances described in subsection (c).
- (e) Canada will send any Notice or CAR by any method Canada chooses, in its absolute discretion. The Bidder must submit its response by the method stipulated in the Notice or CAR. Responses are deemed to be received by Canada at the date and time they are delivered to Canada by the method and at the address specified in the Notice or CAR. An email response permitted by the Notice or CAR is deemed received by Canada on the date and time it is received in Canada's email inbox at Canada's email address specified in the Notice or CAR. A Notice or CAR sent by Canada to the Bidder at any address provided by the Bidder in or pursuant to the Bid is deemed received by the Bidder on the date it is sent by Canada. Canada is not responsible for late receipt by Canada of a response, however caused.

4.1.1.2 (2018-03-13) Phase I: Financial Bid

- (a) After the closing date and time of this bid solicitation, Canada will examine the Bid to determine whether it includes a Financial Bid and whether any Financial Bid includes all information required by the solicitation. Canada's review in Phase I will be limited to identifying whether any information that is required under the bid solicitation to be included in the Financial Bid is missing from the Financial Bid. This review will not assess whether the Financial Bid meets any standard or is responsive to all solicitation requirements.
- (b) Canada's review in Phase I will be performed by officials of the Department of Public Works and Government Services.
- (c) If Canada determines, in its absolute discretion that there is no Financial Bid or that the Financial Bid is missing all of the information required by the bid solicitation to be included in the Financial Bid, then the Bid will be considered non-responsive and will be given no further consideration.
- (d) For Bids other than those described in c), Canada will send a written notice to the Bidder ("Notice") identifying where the Financial Bid is missing information. A Bidder, whose Financial Bid has been found responsive to the requirements that are reviewed at Phase I,

will not receive a Notice. Such Bidders shall not be entitled to submit any additional information in respect of their Financial Bid.

- (e) The Bidders who have been sent a Notice shall have the time period specified in the Notice (the "Remedy Period") to remedy the matters identified in the Notice by providing to Canada, in writing, additional information or clarification in response to the Notice. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the Notice.
- (f) In its response to the Notice, the Bidder will be entitled to remedy only that part of its Financial Bid which is identified in the Notice. For instance, where the Notice states that a required line item has been left blank, only the missing information may be added to the Financial Bid, except that, in those instances where the addition of such information will necessarily result in a change to other calculations previously submitted in its Financial Bid, (for example, the calculation to determine a total price), such necessary adjustments shall be identified by the Bidder and only these adjustments shall be made. All submitted information must comply with the requirements of this solicitation.
- (g) Any other changes to the Financial Bid submitted by the Bidder will be considered to be new information and will be disregarded. There will be no change permitted to any other Section of the Bidder's Bid. Information submitted in accordance with the requirements of this solicitation in response to the Notice will replace, in full, only that part of the original Financial Bid as is permitted above, and will be used for the remainder of the bid evaluation process.
- (h) Canada will determine whether the Financial Bid is responsive to the requirements reviewed at Phase I, considering such additional information or clarification as may have been provided by the Bidder in accordance with this Section. If the Financial Bid is not found responsive for the requirements reviewed at Phase I to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase I to the satisfaction of Canada, will receive a Phase II review.

4.1.1.3 (2018-03-13) Phase II: Technical Bid

- (a) Canada's review at Phase II will be limited to a review of the Technical Bid to identify any instances where the Bidder has failed to meet any Eligible Mandatory Criterion. This review will not assess whether the Technical Bid meets any standard or is responsive to all solicitation requirements. Eligible Mandatory Criteria are all mandatory technical criteria that are identified in this solicitation as being subject to the PBCP. Mandatory technical criteria that are not identified in the solicitation as being subject to the PBCP, will not be evaluated until Phase III.
- (b) Canada will send a written notice to the Bidder (Compliance Assessment Report or "CAR") identifying any Eligible Mandatory Criteria that the Bid has failed to meet. A Bidder whose Bid has been found responsive to the requirements that are reviewed at Phase II will receive a CAR that states that its Bid has been found responsive to the requirements reviewed at Phase II. Such Bidder shall not be entitled to submit any response to the CAR.
- (c) A Bidder shall have the period specified in the CAR (the "Remedy Period") to remedy the failure to meet any Eligible Mandatory Criterion identified in the CAR by providing to Canada in writing additional or different information or clarification in response to the CAR. Responses received after the end of the Remedy Period will not be considered by Canada, except in circumstances and on terms expressly provided for in the CAR.

- (d) The Bidder's response must address only the Eligible Mandatory Criteria listed in the CAR as not having been achieved, and must include only such information as is necessary to achieve such compliance. Any additional information provided by the Bidder which is not necessary to achieve such compliance will not be considered by Canada, except that, in those instances where such a response to the Eligible Mandatory Criteria specified in the CAR will necessarily result in a consequential change to other parts of the Bid, the Bidder shall identify such additional changes, provided that its response must not include any change to the Financial Bid.
- (e) The Bidder's response to the CAR should identify in each case the Eligible Mandatory Criterion in the CAR to which it is responding, including identifying in the corresponding section of the original Bid, the wording of the proposed change to that section, and the wording and location in the Bid of any other consequential changes that necessarily result from such change. In respect of any such consequential change, the Bidder must include a rationale explaining why such consequential change is a necessary result of the change proposed to meet the Eligible Mandatory Criterion. It is not up to Canada to revise the Bidder's Bid, and failure of the Bidder to do so in accordance with this subparagraph is at the Bidder's own risk. All submitted information must comply with the requirements of this solicitation.
- (f) Any changes to the Bid submitted by the Bidder other than as permitted in this solicitation, will be considered to be new information and will be disregarded. Information submitted in accordance with the requirements of this solicitation in response to the CAR will replace, in full, only that part of the original Bid as is permitted in this Section.
- (g) Additional or different information submitted during Phase II permitted by this section will be considered as included in the Bid, but will be considered by Canada in the evaluation of the Bid at Phase II only for the purpose of determining whether the Bid meets the Eligible Mandatory Criteria. It will not be used at any Phase of the evaluation to increase or decrease any score that the original Bid would achieve without the benefit of such additional or different information. For instance, an Eligible Mandatory Criterion that requires a mandatory minimum number of points to achieve compliance will be assessed at Phase II to determine whether such mandatory minimum score would be achieved with such additional or different information submitted by the Bidder in response to the CAR. If so, the Bid will be considered responsive in respect of such Eligible Mandatory Criterion, and the additional or different information submitted by the Bidder shall bind the Bidder as part of its Bid, but the Bidder's original score, which was less than the mandatory minimum for such Eligible Mandatory Criterion, will not change, and it will be that original score that is used to calculate any score for the Bid
- (h) Canada will determine whether the Bid is responsive for the requirements reviewed at Phase II, considering such additional or different information or clarification as may have been provided by the Bidder in accordance with this Section. If the Bid is not found responsive for the requirements reviewed at Phase II to the satisfaction of Canada, then the Bid shall be considered non-responsive and will receive no further consideration.
- (i) Only Bids found responsive to the requirements reviewed in Phase II to the satisfaction of Canada, will receive a Phase III evaluation.

4.1.1.4 (2018-03-13) Phase III: Final Evaluation of the Bid

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

4.1.2 Technical Evaluation

4.1.2.1 Mandatory Technical Criteria

Mandatory and point rated technical evaluation criteria as specified in Annex "C" – Evaluation of Offer Rating Guide

The Phased Bid Compliance Process will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.

4.1.2.2 Point Rated Technical Criteria

Point Rated Technical Criteria as specified in Annex "C"

4.1.3 Financial Evaluation

4.1.3.1 Evaluation of Price

SACC *Manual* Clause [M0220T](#) (2016/01/28), Evaluation of Price - Offer

The price of the offer will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, St. Andrews, NB, Canadian customs duties and excise taxes included.

4.1.3.2 Firm Price and/or Rates

The Offeror is required to submit firm prices, rates or both that will apply for the entire period of the Standing Offer.

4.2 Basis of Selection

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

SACC *Manual* Clause [A0027T](#) (2012/07/16), Basis of Selection - Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - (a) comply with all the requirements of the bid solicitation; and
 - (b) meet all mandatory criteria; and
 - (c) obtain the required minimum points specified for each criterion for the technical evaluation, and

- (d) obtain the required minimum of 80 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 140 points.
2. Bids not meeting (a) or (b) or (c) and (d) will be declared non-responsive.
 3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60 % for the technical merit and 40% for the price.
 4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
 5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
 6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
 7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates **an example** where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

EXAMPLE:

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)

	<i>Bidder</i>		
	<i>Bidder 1</i>	<i>Bidder 2</i>	<i>Bidder 3</i>
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price	\$55,000.00	\$50,000.00	\$45,000.00
Calculations			
Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$	$92/135 \times 60 = 40.89$
Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating	83.84	75.56	80.89
Overall Rating	1st	3rd	2nd

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Offerors must provide the required certifications and additional information to be issued a standing offer.

The certifications provided by offerors to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare an offer non-responsive, will have the right to set-aside a standing offer, or will declare a contractor in default if any certification made by the Offeror is found to be untrue whether made knowingly or unknowingly during the offer evaluation period, during the Standing Offer period, or during the contract period.

The Standing Offer Authority will have the right to ask for additional information to verify the Offeror's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Standing Offer Authority will render the offer non-responsive, result in the setting aside of the Standing Offer or constitute a default under the Contract.

5.1 Certifications Required with the Offer

Offerors must submit the following duly completed certifications as part of their offer.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to the Issuance of a Standing Offer and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Standing Offer Certification

By submitting an offer, the Offeror certifies that the Offeror, and any of the Offeror's members if the Offeror 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-Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#s4>).

Canada will have the right to declare an offer non-responsive, or to set-aside a Standing Offer, if the Offeror, or any member of the Offeror if the Offeror is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of issuing of a Standing Offer or during the period of the Standing Offer.

5.2.3 Additional Certifications Precedent to Issuance of a Standing Offer

5.2.3.1 Canadian Content Certification

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

Canadian Content Certification

This procurement is conditionally limited to Canadian services.

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

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

The Bidder certifies that:

() the services offered are Canadian services as defined in paragraph 4 of clause A3050T.

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

(Derived from - Provenant de: A3066T, 18/12/06)

5.2.3.2 Status and Availability of Resources

The Offeror certifies that, should it be issued a standing offer as a result of the Request for Standing Offer, every individual proposed in its offer will be available to perform the Work resulting from a call-up against the Standing Offer as required by Canada's representatives and at the time specified in a call-up or agreed to with Canada's representatives. If for reasons beyond its control, the Offeror is unable to provide the services of an individual named in its offer, the Offeror may propose a substitute with similar qualifications and experience. The Offeror must advise the Standing Offer 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 Offeror: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Offeror has proposed any individual who is not an employee of the Offeror, the Offeror 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 Offeror must, upon request from the Standing Offer Authority, provide a written confirmation, signed by the individual, of the permission given to the Offeror and of his/her availability. Failure to comply with the request may result in the offer being declared non-responsive.

(Derived from - Provenant de: M3020T, 2016/01/28)

5.2.3.3 Education and Experience

The Offeror certifies that all the information provided in the résumés and supporting material submitted with its offer, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Offeror to be true and accurate. Furthermore, the Offeror warrants that every individual offered by the Offeror for the requirement is capable of performing the Work resulting from a call-up against the Standing Offer.

(Derived from - Provenant de: M3021T, 2012/07/16)

PART 6 - SECURITY, FINANCIAL AND INSURANCE REQUIREMENTS

6.1 Security Requirements

1. Before issuance of a standing offer, the following conditions must be met:
 - (a) the Offeror must hold a valid organization security clearance as indicated in Part 7A - Standing Offer;
 - (b) the Offeror's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7A - Standing Offer;
 - (c) the Offeror must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Offerors are reminded to obtain the required security clearance promptly. Any delay in the issuance of a standing offer to allow the successful Offeror to obtain the required clearance will be at the entire discretion of the Standing Offer Authority.
3. For additional information on security requirements, offerors 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.

6.2 Financial Capability

SACC Manual clause [M9033T](#) (2011/05/16) Financial Capability

6.3 Insurance Requirements

Insurance Requirements – Proof of Availability – Prior to issuance of a Standing Offer

The Offeror must provide a letter from an insurance broker or an insurance company licensed to operate in Canada stating that the Offeror, if issued a standing offer as a result of the request for standing offer, can be insured in accordance with the Insurance Requirements specified in Annex "F".

If the information is not provided in the offer, the Standing Offer Authority will so inform the Offeror and provide the Offeror with a time frame within which to meet the requirement. Failure to comply with the request of the Standing Offer Authority and meet the requirement within that time period will render the offer non-responsive.

(Derived from - Provenant de: M9015T, 2016/01/28)

PART 7 - STANDING OFFER AND RESULTING CONTRACT CLAUSES

A. STANDING OFFER

7.1 Offer

7.1.1 The Offeror offers to fulfill the requirement in accordance with the Requirement at Annex "A".

7.2 Security Requirements

7.2.1 The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Standing Offer.

7.3 Standard Clauses and Conditions

All clauses and conditions identified in the Standing Offer 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.

7.3.1 General Conditions

2005 (2017/06/21) General Conditions - Standing Offers - Goods or Services, apply to and form part of the Standing Offer.

7.3.2 Standing Offers Reporting

Periodic Usage Reports - Standing Offer

The Offeror 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 Offeror 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 Offeror 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 10 calendar days after the end of the reporting period.

(Derived from - Provenant de: M7010C, 2017/06/21)

7.4 Term of Standing Offer

7.4.1 Period of the Standing Offer

The period for making call-ups and providing services against the Standing Offer is from date of award to March 31st, 2023 inclusive.

7.4.2 Extension of Standing Offer

If the Standing Offer is authorized for use beyond the initial period, the Offeror offers to extend its offer for **two (2)** additional one (1) year period, from April 1, 2023 to March 31st, 2024 and from April 1st, 2024 to March 31st, 2025 under the same conditions and at the rates or prices specified in the Standing Offer, or at the rates or prices calculated in accordance with the formula specified in the Standing Offer.

The Offeror will be advised of the decision to authorize the use of the Standing Offer for an extended period by the Standing Offer Authority thirty **(30) days before the expiry date** of the Standing Offer. A revision to the Standing Offer will be issued by the Standing Offer Authority.

(Derived from - Provenant de: M9014C, 2008/05/12)

7.4.3 Delivery Points

Delivery of the requirement will be made to delivery point(s) specified at Annex "A" of the Standing Offer.

7.5 Authorities

7.5.1 Standing Offer Authority

The Standing Offer Authority is:

Name: Leesa Young
Title: Supply Officer
Public Services and Procurement Canada
Acquisitions Branch
Address: 1045 Main Street, 4th Floor
Moncton, New Brunswick
E1C 1H1
Telephone: (506) 871-1716
Facsimile: (506) 851-6759
E-mail address: leesa.young@pwgsc-tpsgc.gc.ca

The Standing Offer Authority is responsible for the establishment of the Standing Offer, its administration and its revision, if applicable. Upon the making of a call-up, as Contracting Authority, he is responsible for any contractual issues relating to individual call-ups made against the Standing Offer by any Identified User.

7.5.2 Project Authority

The Project Authority for the Standing Offer is identified in the call-up against the Standing Offer.

The Project Authority is the representative of the department or agency for whom the Work will be carried out pursuant to a call-up against the Standing Offer and is responsible for all the technical content of the Work under the resulting Contract.

7.5.3 Offeror's Representative (Offeror please complete)

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: _____

Facsimile: _____

E-mail address: _____

7.6 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.

(Derived from - Provenant de: A3025C, 2013/03/21)

7.7 Identified Users

The Identified User authorized to make call-ups against the Standing Offer is the project authority identified in 7.5.2.

7.8 Call-up Procedures

The call-up Authority for the Department will issue the Call-up to the firm holding the Standing Offer for the service.

7.9 Call-up Instrument

The Work will be authorized or confirmed by the Identified User(s) using the duly completed forms or their equivalents as identified in paragraphs 1 and 2 below, or by using Canada acquisition cards (Visa or MasterCard) for low dollar value requirements.

1. Call-ups must be made by Identified Users' authorized representatives under the Standing Offer and must be for goods or services or combination of goods and services included in the Standing Offer at the prices and in accordance with the terms and conditions specified in the Standing Offer.
2. Any of the following forms could be used which are available through [PWGSC Forms Catalogue](#) website:
 - PWGSC-TPSGC 942 Call-up Against a Standing Offer

7.10 Limitation of Call-ups

Individual call-ups against the Standing Offer must not exceed **\$100,000.00** (Applicable Taxes included).

7.11 Financial Limitation

The total cost to Canada resulting from call ups against the Standing Offer must not exceed the sum of **\$1,350,000.00** (Applicable Taxes included) unless otherwise authorized in writing by the Standing Offer Authority. The Offeror must not perform any work or services or supply any articles in response to call ups which would cause the total cost to Canada to exceed the said sum, unless an increase is so authorized.

The Offeror must notify the Standing Offer Authority as to the adequacy of this sum when 75 percent of this amount has been committed, or four (4) months before the expiry date of the Standing Offer, whichever comes first. However, if at any time, the Offeror considers that the said sum may be exceeded, the Offeror must promptly notify the Standing Offer Authority.

(Derived from - Provenant de: M4506C, 2013/04/25)

7.12 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 call up against the Standing Offer, including any annexes;
- b) the articles of the Standing Offer;
- c) the general conditions [2005](#) (2017/06/21), General Conditions - Standing Offers - Goods or Services
- d) the general conditions [2040](#) (2018/06/21), General Conditions - Research and Development;
- e) Annex A, Statement of Requirement;
- f) Annex B, Basis of Payment;
- g) Annex C, Evaluation of proposal – Rating guide
- h) Annex D, Security Requirements Check List;
- i) the Offeror's offer dated _____, as clarified on _____ as amended on _____.

7.13 Certifications and Additional Information

7.13.1 Compliance

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

7.13.2 SACC Manual Clauses

SACC Reference	Section	Date
M3020C	Status and Availability of Resources – Standing Offer	2016/01/28
M3060C	Canadian Content Certification	2008/05/12

7.14 Applicable Laws

The Standing Offer and any contract resulting from the Standing Offer must be interpreted and governed, and the relations between the parties determined, by the laws in force in **New Brunswick**.

7.15 Transition to an e-Procurement Solution (EPS)

During the period of the Standing Offer, Canada may transition to an EPS for more efficient processing and management of individual call-ups for any or all of the SO's applicable goods and services. Canada reserves the right, at its sole discretion, to make the use of the new e-procurement solution mandatory.

Canada agrees to provide the Offeror with at least a three-month notice to allow for any measures necessary for the integration of the Offer into the EPS. The notice will include a detailed information package indicating the requirements, as well as any applicable guidance and support.

If the Offeror chooses not to offer their goods or services through the e-procurement solution, the Standing Offer may be set aside by Canada.

B. RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from a call-up against the Standing Offer.

7.1 Statement of Requirement

The Contractor must perform the Work described in the call-up against the Standing Offer.

7.2 Standard Clauses and Conditions

7.2.1 General Conditions

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

Section 19 Interest on Overdue Accounts, of 2040 (2013-06-27), General Conditions – Research and Development will not apply to payments made by credit cards.

7.3 Term of Contract

7.3.1 Period of the Contract

7.3.2 Delivery Date

The Work must be completed in accordance with the call-up against the Standing Offer.

7.4 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.

(Derived from - Provenant de: A3025C, 2013/03/21)

7.5 Payment

7.5.1 Basis of Payment

The Contractor shall be paid in accordance with Annex "B", Basis of payment.

7.5.2 Limitation of expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed **\$1,350,000.00**. Customs duties are included and Applicable Taxes are included.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75% committed, or
 - b. four months before the contract expiry date, or
 - c. as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work, whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

(Derived from - Provenant de: C6001C, 2017/08/17)

7.5.3 Single Payment

SACC Reference	Section	Date
H1000C	Single Payment	2008/05/12

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

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

7.5.4 Electronic Payment of Invoices – Call-up

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

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

7.6 Invoicing Instructions

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.
2. Invoices must be distributed as follows:
 - (a) The original and one (1) copy must be forwarded to the address shown on page 1 of the Contract for certification and payment.

(Derived from - Provenant de: H5001C, 2008/12/12)

7.7 Insurance Requirements

Insurance - Specific Requirements

The Contractor must comply with the insurance requirements specified in 7.8 of part B, below. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the

insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

(Derived from - Provenant de: G1001C, 2013/11/06)

Commercial General Liability Insurance

1. The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.
2. The Commercial General Liability policy must include the following:
 - a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.
 - b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.
 - c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.
 - d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.
 - e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.
 - f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.
 - g) Employees and, if applicable, Volunteers must be included as Additional Insured.
 - h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)
 - i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.
 - j) Notice of Cancellation: The Contractor will provide the Contracting Authority thirty (30) days prior written notice of policy cancellation or any changes to the insurance policy.
 - k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

Solicitation No. - N° de l'invitation
F5240-190020/A
Client Ref. No. - N° de réf. du client
F5240-190020/A

Amd. No. - N° de la modif.
File No. - N° du dossier
MCT-9-42017

Buyer ID - Id de l'acheteur
MCT033
CCC No./N° CCC - FMS No./N° VME

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

(Derived from - Provenant de: G2001C, 2018/06/21)

7.8 SACC Manual Clauses

SACC Reference	Section	Date
A9068C	Government Site Regulations	2010/01/11
G2001C	Commercial General Liability Insurance	2018/06/21
G2002C	Errors and Omissions Liability Insurance	2018/06/21

ANNEX "A" STATEMENT OF REQUIREMENT

Title: Standing Offer for Taxonomic and Biodiversity Scientific Services

The Phased Bid Compliance Process will apply only to mandatory technical criteria identified by the superscript (^{PB}). Mandatory technical criteria not identified by the superscript (^{PB}) will not be subject to the Phased Bid Compliance Process.

Mandatory Criteria: Yes or No evaluation

The offeror MUST have extensive¹ expertise and experience in:

- 1) Taxonomy and biodiversity of all life stages (larval, juvenile and adult) for a wide range of Canadian Atlantic fauna (sponges to fishes)
 - 2) Data preparation for web sharing and familiarization with biodiversity data sharing organizations
 - 3) High quality processing of marine biological samples.
 - 4) Established experience in biological specimen curation and access to appropriate archive and specimen storage facilities
-

Duration: Commencing from date of award to March 31, 2023. With two one-year options to extend.

Background:

The Department of Fisheries and Oceans Canada (DFO) occasionally requires scientific services requiring a high level of taxonomic expertise in a broad range of marine animal taxa, usually in the context of specific research projects. These services are provided by taxonomists, aquatic biologists, technicians, etc.

Field sample collection will be within the Atlantic Canada region or, occasionally, from other Canadian regions using DFO/CCG vessels. The contractor may also be provided with samples for taxonomic analyses from other research projects as determined necessary by DFO personnel.

¹ Greater than 5 years and supported by successful contracts, established publication record and references that relate to at least three (3) of the five (5) Services Required.

SERVICES REQUIRED:

The Department of Fisheries and Oceans Canada (DFO) requires the following scientific services on an "as and when" requirement basis:

1. Biological sample processing:

- a. Zooplankton per 1 L samples
- b. Ichthyoplankton 1 L samples
- c. Zooplankton and ichthyoplankton 1 L samples
- d. Benthos 0.05m² grab samples
- e. Fishes and invertebrates (all life stages) from research collections, including those from environments rarely sampled, or of rare taxa or life stages.
- f. Fish stomach contents - volume determined by fish species/size.

Anticipated requirements will vary from one to numerous samples from each category (a-f) with an estimated processing and analysis time requirement of 5-10 weeks spread over 2-3 months to 1 year for multiple sample projects. Sample processing services also may require permanent archiving of identified specimens and web-ready digitization of resulting data.

2. Taxonomic, biodiversity, environmental, or ecological research or related research services

- a. Develop, add to, or quality control taxonomic or geographic species lists
- b. Develop, add to, or quality control datasets and metadata to facilitate data sharing with partners (e.g., DFO partners with the Canadian Register of Marine Species, the Ocean Biogeographic Information System, the Global Biodiversity Information Facility, the Northeast Coastal and Ocean Data Partnership, the World Register of Marine Species, the Canadian Geospatial Data Infrastructure and the DNA Barcode of Life [voucher and tissue samples]).
- c. Resolve taxonomic problems of priority to DFO.
- d. Conduct biodiversity, environmental or ecological studies, field surveys, monitoring, and sample assessment/analysis (funded through competitive DFO research funds).
- e. Facilitate meetings, provision of other consultation services, and report writing.

It is anticipated that approximately 5-10 weeks/year are required to resolve taxonomic problems (approximately 10-25 requests for taxonomic assistance/confirmations per year). Two (2) months/year are anticipated for web-based analyses and 2-4 month/year for other information services.

Facilitation of multi-stakeholder meetings and conferences with an emphasis on Indigenous engagement to obtain the information to resolve problems and provide data for the analyses will be required.

3. Training

Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments. Training will vary from 1 day to 2 weeks in duration depending on the complexity of the taxon/taxa involved. It is anticipated that up to four weeks/year will be required for taxonomic training.

4. Preparation of field identification guides:

It is anticipated that one to two guides may be requested per year. Each guide is expected to take up to two months to complete.

5. National General Status Assessments (NGSA) of Species at Risk:

- a) provide species lists for defined taxa and geographic scope
- b) assemble background information on species (COSEWIC reports, IUCN ranking, population trends, abundance estimates, distribution, potential threats, existing protection/recovery plans)
- c) provide spreadsheets of trends in species distribution, abundance, populations, and threats
- d) provide completed templates with final National General Status ranks for all assessed species
- e) provide additional advice and service as requested, e.g.:
 - i. assist regional experts with ranking criteria for general status assessments for species occurring in their jurisdictions,
 - ii. provide expert advice on general status ranking system and assessment criteria.

It is anticipated that NGSAs will be required once every three (3) years, but require substantial expertise and time (approximately 3 months/project).

Deliverables:

Electronic reports/files, hard copy file, or both; as appropriate for the specific project.

Note: Where practical, submissions, reports or written communication will be made on recycled, double side printed paper or on an electronic storage device compatible with DFO PC computer systems.

ANNEX "B" BASIS OF PAYMENT

Offerors must complete the pricing table for all services listed below. Offerors must quote firm, all-inclusive rates, including associated overhead, profit and materials required to complete the services as described in the Statement of Work. Prices quoted are exclusive of HST/GST.

The rates set out below will remain firm during the period of the Standing Offer.

Estimated quantities are based on anticipated requirements, provided in good faith, and are estimates only for evaluation purposes and do not mean that quantities will be used or exceeded.

Following are the Firm *FOB Destination St. Andrews, NB*, all-inclusive hourly rates for the following services/labour categories. **For evaluation purposes the estimated usage figures provided will be multiplied by the firm hourly rate. Items 1 to 5 will be added to arrive at the total cost.**

YEAR ONE – FROM DATE OF AWARD TO 2020-03-31

Services	Estimated hours (A1)	Rate per hour (B1) (offeror to complete)	Total (C1) (A1xB1=C1) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitization of data	400 hrs 200 hrs 80 hrs	\$_____/hr \$_____/hr \$_____/hr	\$_____ \$_____ \$_____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services	400 hrs 400 hrs 160 hrs 200 hrs	\$_____/hr \$_____/hr \$_____/hr \$_____/hr	\$_____ \$_____ \$_____ \$_____

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e. facilitation of meetings, consultation, and report writing	100 hrs	\$_____/hr	\$_____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$_____/hr	\$_____
4. Labour cost for preparation of field identification guides	320 hrs	\$_____/hr	\$_____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$_____/hr	\$_____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Year one (C1)			\$_____

YEAR TWO – FROM 2020-04-01 TO 2021-03-31

Services	Estimated hours (A2)	Rate per hour (B2) (offeror to complete)	Total (C2) (A2XB2=C2) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitisation of data	400 hrs 200 hrs 80 hrs	\$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services e. facilitation of meetings, consultation, and report writing	400 hrs 400 hrs 160 hrs 200 hrs 100 hrs	\$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$ _____/hr	\$ _____
4. Labour cost for preparation of field identification guides	320 hrs	\$ _____/hr	\$ _____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$ _____/hr	\$ _____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Year two (C2)			

YEAR THREE – FROM 2021-04-01 TO 2022-03-31

Services	Estimated hours (A3)	Rate per hour (B3) (offeror to complete)	Total (C3) (A3xB3=C3) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitization of data	400 hrs 200 hrs 80 hrs	\$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services e. facilitation of meetings, consultation, and report writing	400 hrs 400 hrs 160 hrs 200 hrs 100 hrs	\$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$ _____/hr	\$ _____
4. Labour cost for preparation of field identification guides	320 hrs	\$ _____/hr	\$ _____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$ _____/hr	\$ _____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Year three (C3)			

YEAR FOUR – FROM 2022-04-01 TO 2023-03-31

Services	Estimated hours (A4)	Rate per hour (B4) (offeror to complete)	Total (C4) (A4xB4=C4) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitisation of data	400 hrs 200 hrs 80 hrs	\$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services e. facilitation of meetings, consultation, and report writing	400 hrs 400 hrs 160 hrs 200 hrs 100 hrs	\$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$ _____/hr	\$ _____
4. Labour cost for preparation of field identification guides	320 hrs	\$ _____/hr	\$ _____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$ _____/hr	\$ _____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Year four (C4)			

OPTION YEAR ONE – FROM 2023-04-01 TO 2024-03-31

Services	Estimated hours (A5)	Rate per hour (B5) (offeror to complete)	Total (C5) (A5xB5=C5) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitisation of data	400 hrs 200 hrs 80 hrs	\$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services e. facilitation of meetings, consultation, and report writing	400 hrs 400 hrs 160 hrs 200 hrs 100 hrs	\$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$ _____/hr	\$ _____
4. Labour cost for preparation of field identification guides	320 hrs	\$ _____/hr	\$ _____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$ _____/hr	\$ _____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Option Year one (C5)			

OPTION YEAR TWO – FROM 2024-04-01 TO 2025-03-31

Services	Estimated hours (A6)	Rate per hour (B6) (offeror to complete)	Total (C6) (A6xB6=C6) (offeror to complete)
1. Biological sample processing: a) Sample processing b) Archiving specimens/samples c) Digitisation of data	400 hrs 200 hrs 80 hrs	\$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____
2. Taxonomic, biodiversity, environmental, or ecological research or related information services: a. quality control of species lists b. quality control for data-sharing with research partners c. taxonomic problem resolution and for biodiversity/environmental and ecological baseline studies d. biodiversity, environmental or ecological studies, monitoring and sample assessment/analyses and other information Services e. facilitation of meetings, consultation, and report writing	400 hrs 400 hrs 160 hrs 200 hrs 100 hrs	\$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr \$ _____/hr	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
3. Training: Taxonomic training for students, casual employees and staff, as appropriate, on all life stages of all fishes and invertebrates from marine and estuarine environments	160 hrs	\$ _____/hr	\$ _____
4. Labour cost for preparation of field identification guides	320 hrs	\$ _____/hr	\$ _____
5. Labour Cost for National General Status Assessments (NGSA) of Species at Risk	200 hrs	\$ _____/hr	\$ _____
Total Estimated Limitation of expenditure			
Total items #1 to #5, Option Year two (C6)			

ANNEX "C" EVALUATION OF PROPOSALS – RATING GUIDE

Standing Offer for Taxonomic and Biodiversity Scientific Services

The Phased Bid Compliance Process will apply only to mandatory technical criteria identified by the superscript ^(PB). Mandatory technical criteria not identified by the superscript ^(PB) will not be subject to the Phased Bid Compliance Process.

1. Technical Offer **MUST** meet all of the following mandatory requirements. Offerors must be supported by proper and adequate detail, particularly where a mandatory item requires supporting evidence. Those not meeting all of these mandatory requirements will be given no further consideration.
2. The mandatory evaluation criteria are:

ATTENTION OFFERORS: WRITE THE RELEVANT PAGE NUMBER(S) FROM YOUR TECHNICAL OFFER WHICH ADDRESSES THE ISSUE BESIDE THE CRITERIA BELOW.

MANDATORY CRITERIA	YES / NO	Cross reference to specific Pages in proposal
1. ^(PB) . Bidders MUST have at least five years' experience in the <u>taxonomy and biodiversity</u> of all life stages (larval, juvenile and adult) for a wide range of Canadian Atlantic fauna (sponges to fishes), as evidenced by successful contracts, primary publication records and references		
2. ^(PB) . Bidders MUST have at least five years' experience in <u>data preparation for web sharing and with biodiversity data sharing organizations</u> , as evidenced by successful contracts, primary publication records and references		
3. ^(PB) . Bidders MUST have at least five years' experience in <u>quality-controlled processing of marine biological samples</u> , as evidenced by successful contracts, primary publication records and references		
4. ^(PB) . Bidders MUST have at least five years' experience in <u>marine biological specimen curation and have access to appropriate archive and specimen storage facilities</u> , as evidenced by successful contracts and references.		
RATED REQUIREMENTS (Maximum 140 points – Minimum 80 points)		Cross reference to specific Pages in proposal
1. Demonstration of Technical Understanding and/or Experience with Services Required, scope and methodology (Maximum 120 points– Minimum 70 points)		
2. Demonstration of Management Criteria for the Services Required (Maximum 20 points – Minimum 10 points)		

TECHNICAL CRITERIA	Points	Cross reference to specific Pages in proposal
<p>1. Biological sample processing and identification to species (Max 30 points):</p> <ul style="list-style-type: none"> • The proposal does not demonstrate an understanding of the scope of sample collections and identification expertise required for this service requirement. • The proposal indicates limited experience in a limited number of taxonomic, life-stage or stomach contents, as described in the Statement of Work (Section 1a-f). • The proposal indicates extensive experience in a limited number of taxonomic, life-stage or stomach contents, as described in the Statement of Work (Section 1a-f). • The proposal indicates extensive experience in most, but not all of taxonomic, life-stage or stomach contents, as described in the Statement of Work (Section 1a-f). • The proposal indicates extensive experience in all taxonomic, life-stage or stomach contents, as described in the Statement of Work (Section 1a-f). 	<p>0-5 6-10 11-20 21-25 26-30</p>	
<p>2. Taxonomic, biodiversity, environmental or ecological research or related information services (Max 30 points)</p> <ul style="list-style-type: none"> • The proposal does not demonstrate an understanding of the scope of information services as described in Section 2a-d. • The proposal indicates limited experience in a limited number of information services as described in Section 2a-d. • The proposal indicates extensive experience in a limited number of information services as described in Section 2a-d. • The proposal indicates extensive experience in most, but not all of information services as described in Section 2a-d. • The proposal indicates extensive experience in all information services as described in Section 2a-d. 	<p>0-5 6-10 11-20 21-25 26-30</p>	
<p>3. Facilitate meetings, provision of other consultation services, and report writing (Max 10 points)</p> <ul style="list-style-type: none"> • The proposal does not demonstrate any experience with multi-stakeholder engagement. • The proposal indicates some facilitation experience, but limited or no 	<p>0-2 3-5 6-8</p>	

<p>experience with multi-stakeholder sessions.</p> <ul style="list-style-type: none"> The proposal provides evidence of limited to moderate experience with facilitating multi-stakeholder meeting. The proposal provides evidence of direct experience with facilitating multi-stakeholder meetings, including engagement with Indigenous communities. 	<p>9-10</p>	
<p>4. Taxonomic Training for students, casual employees and staff, as appropriate, on all life-stages of all fishes and invertebrates from marine and estuarine environments (Max 20 points)</p> <ul style="list-style-type: none"> The proposal does not demonstrate experience of provision of taxonomic training. The proposal indicates experience with taxonomic training but does not provide evidence of the taxonomic scope of the training The proposal provides evidence of taxonomic training but for a limited range of taxa. The proposal provides evidence of taxonomic training in a wide range of taxa and to a wide range of scientific expertise. 	<p>0-3 4-8 9-15 16-20</p>	
<p>5. Preparation of field identification guides (Max 20 points)</p> <ul style="list-style-type: none"> The proposal does not demonstrate experience with production of field identification guides. The proposal indicates experience with producing field guides but does not provide evidence of the taxonomic scope of the guides. The proposal provides evidence of production of a limited number or taxonomic scope field guides. The proposal provides evidence of extensive field identification guide production on a broad range of marine an estuarine fish and invertebrates. 	<p>0-3 4-8 9-15 16-20</p>	
<p>6. National General Status Assessments (NGSA) of Species at Risk (Max 10 points)</p> <ul style="list-style-type: none"> The proposal does not demonstrate any experience with NGSA, but some experience with Species at Risk. The proposal indicates awareness of, but limited or no experience with NGSA work. The proposal provides evidence of limited to moderate experience with NGSA work. The proposal provides evidence of direct experience with NGSA work. 	<p>0-2 3-5 6-8 9-10</p>	

MANAGEMENT CRITERIA (Max 20 points)	Points	Cross reference to specific Pages in proposal
1. Facilities that can accommodate small to large volumes of marine biological specimens and safely manage associated chemicals. <ul style="list-style-type: none"> • The proposal does not describe this capacity/capability • The proposal describes capacity or chemical management but not both • The proposal describes both facility management requirements satisfactorily 	0 1-3 3-4	
2. Computer and weblink systems that can manage taxonomic raw and metadata <ul style="list-style-type: none"> • The proposal does not describe data management capacity/capability • The proposal describes some capability for data management • The proposal clearly describes experience in managing raw and meta taxonomic data 	0 1-2 3-4	
3. Quality assurance/quality control (QA/QC) standard operating procedures (SOPs) for specimen handling and taxonomic accuracy <ul style="list-style-type: none"> • The proposal does not describe QA/QC management systems or associated SOPs • The proposal describes QA/QC and SOPs for specimen handling or taxonomic accuracy but not both • The proposal describes QA/QC and SOPs for both specimen handling or taxonomic accuracy but not both 	0 1-2 3-4	
4. Government of Canada security clearance (Reliable)	0 or 4 (no or yes)	
5. Financial comptrollership for multiple project budget management <ul style="list-style-type: none"> • The proposal does not describe financial management systems for multiple projects • The proposal provides limited description of project financial management • The proposal describes in detail how project finances will be managed 	0 1-2 3-4	

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ANNEX "D" SECURITY REQUIREMENTS CHECK LIST (page 1 of 4)

Security Clauses #2 – Access to PROTECTED A information/assets at DFO site(s)

The supplier and its personnel who require access to PROTECTED information/assets must each hold and maintain a valid **RELIABILITY STATUS** issued by Canada and approved by Fisheries and Oceans Canada.

The supplier and all individuals assigned to work on the contract or arrangement **MUST NOT** remove any PROTECTED or CLASSIFIED information/assets from DFO site(s).

Subcontracts or arrangements with a third party are not to be awarded without the prior written permission of Fisheries and Oceans Canada (i.e. a new SRCL must be submitted and processed following the same procedure as for the initial contract).

The supplier must comply with any other security requirements set by Fisheries and Oceans Canada that are contained in this contract or arrangement and any security attachment.



**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 **DFO** 2. Branch or Directorate / Direction générale ou Direction **EOS / SCIENCE**

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
Standing Offer for Taxonomic and Biodiversity Scientific Services

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

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"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> Specify country(ies): / Préciser le(s) pays:	Restricted to: / Limité à: <input type="checkbox"/> 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"/>



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



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	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 indiquer qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Solicitation No. - N° de l'invitation
F5240-190020/A
Client Ref. No. - N° de réf. du client
F5240-190020/A

Amd. No. - N° de la modif.
File No. - N° du dossier
MCT-9-42017

Buyer ID - Id de l'acheteur
MCT033
CCC No./N° CCC - FMS No./N° VME

ANNEX “E” to PART 3 OF THE REQUEST FOR STANDING OFFERS ELECTRONIC PAYMENT INSTRUMENTS

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

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

