



RETURN BIDS TO:

**Employment and Social Development
Canada (ESDC)**

Attention:

nc-solicitations-gd@hrsdc-rhdcc.gc.ca

REQUEST FOR PROPOSAL

**Proposal To: Employment and Social
Development Canada**

Title: Post-study Survey of Student Loan Borrowers for the
Canada Student Loans Program Evaluation

Solicitation No. 100013132

Date: September 20, 2019

Solicitation Closes

October 30, 2019 @ 02 :00 PM / 14 h Eastern Standard Time

Address Inquiries to :

nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Size limit – 13MB

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

Instructions : See Herein

Vendor/firm Name and address :

Telephone:

E-mail address:

Name and title of person authorized to sign on behalf of Vendor/firm (type or print)

Signature

Date

TABLE OF CONTENTS



PART 1 - GENERAL INFORMATION

- 1.1 Introduction
- 1.2 Summary
- 1.3 Debriefings

PART 2 - BIDDER INSTRUCTIONS

- 2.1 Standard Instructions, Clauses and Conditions
- 2.2 Submission of Bids
- 2.3 Former Public Servant
- 2.4 Enquiries - Bid Solicitation
- 2.5 Applicable Laws
- 2.6 Basis for Canada's Ownership of Intellectual Property

PART 3 - BID PREPARATION INSTRUCTIONS

- 3.1 Bid Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

- 4.1 Evaluation Procedures
- 4.2 Basis of Selection

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

- 5.1 Certifications Required with the Bid
- 5.2 Certifications Precedent to Contract Award and Additional Information

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

- 6.1 Security Requirements

PART 7 - RESULTING CONTRACT CLAUSES

- 7.1 Statement of Work
- 7.2 Standard Clauses and Conditions
- 7.3 Security Requirements
- 7.4 Term of Contract
- 7.5 Authorities
- 7.6 Proactive Disclosure of Contracts with Former Public Servants
- 7.7 Payment
- 7.8 Invoicing Instructions
- 7.9 Certifications and Additional Information
- 7.10 Applicable Laws



7.11 Priority of Documents

ANNEX “A”
Statement of Work

ANNEX “B”
Basis of Payment

ANNEX “C”
Security Requirements Check List



PART 1 - GENERAL INFORMATION

1.1 Introduction

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

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, Security Requirements, the Security Requirements Checklist, Certification, and any other annexes.

1.2 Summary

- 1.2.1** The Contractor will be required to conduct a survey of about 20-30 minutes with roughly 3,000 recipients of student loans whose last year of post-secondary education occurred in 2016. The sampled population by province/territory, gender, and PSE institution type should be representative of the Canadian population of these CSLP recipients.

There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

- 1.2.2** The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the North American Free Trade Agreement (NAFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), and the Canadian Free Trade Agreement (CFTA).



1.3 Debriefings

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



PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the

[Standard Acquisition Clauses and Conditions Manual](#)

<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>

issued by Public Works and Government Services Canada.

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

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

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

Delete: 60 days

Insert: 120 days

2.2 Submission of Bids

Bids must be received at the email address nc-solicitations-gd@hrsdcc.gc.ca, by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.

2.3 Former Public Servant

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

Definitions



RFP 100013132

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

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

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

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

Former Public Servant in Receipt of a Pension

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

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

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

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

Work Force Adjustment Directive

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

If so, the Bidder must provide the following information:

- a. name of former public servant;



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

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **15 calendar days** before the bid closing date. Enquiries received after that time may not be answered.

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

2.5 Applicable Laws

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

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

2.6 Basis for Canada's Ownership of Intellectual Property

The Employment & Social Development Canada (ESDC) has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, for the following reasons, as set out in the [*Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts*](#):

- To generate knowledge and information for public dissemination



PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Bids must be received at the email address nc-solicitations-gd@hrsdc-rhdcc.gc.ca, by the time and date indicated on the cover page of this RFP document.

It is the Bidders responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt. Bidders should ensure e-mails do not exceed 13MB to avoid problems with transmission.

Canada requests that Bidders provide their full company name and address, e-mail address, as well as contact name, and telephone number.

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

Section I: Technical Bid 1 soft copy via e-mail, nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section II: Financial Bid 1 soft copy via e-mail, nc-solicitations-gd@hrsdc-rhdcc.gc.ca

Section III: Certifications 1 soft copy via e-mail, nc-solicitations-gd@hrsdc-rhdcc.gc.ca

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

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

Section I: Technical Bid

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

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



Section II: Financial Bid

3.1.1 Bidders must submit their financial bid in accordance with the Pricing Schedule detailed below; The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be shown separately, if applicable.

Deliverable	Completion Date	Payment (%)
1. Submit methodology report, recruitment plan and questionnaires	December 31, 2019	15%
2. Recruit survey participants and conduct survey with approximately 3,000 completions	April 1, 2020	0.02% of the overall budget per survey to a maximum of 3,000 completed surveys Example 1: o $0.02 \times \$115,000 \times 3000$ completed surveys = \$69,000 (\$23 per completed survey) Example 2: o $0.02 \times 100,000 \times 2700$ completed surveys = \$54,000 (\$20 per completed survey)
3. Submit preliminary draft report	May 15, 2020	15%
4. Submit final report and survey results database	June 15, 2020	10%
Note: A completion is defined as a survey where at least 75% of the questions have been answered.		

Section III: Certifications

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

Section IV: Additional Information

In Section IV of their bid, bidders should provide:



1. their legal name;
2. their Procurement Business Number (PBN);
3. the name of the contact person (provide also this person's mailing address, phone and facsimile numbers and email address) authorized by the Bidder to enter into communications with Canada with regards to their bid, and any contract that may result from their bid;
4. for Part 2, article 2.3, Former Public Servant, of the bid solicitation: the required answer to each question; and, if the answer is yes, the required information;
5. for Part 6, article 6.1, Security Requirement, of the bid solicitation:
 - a) for each individual who will require access to classified or protected information, assets or sensitive work sites:
 - 1) the name of the individual;
 - 2) the date of birth of the individual; and
 - 3) if available, information confirming the individual meets the security requirement as indicated in Part 7 - Resulting Contract Clauses;

3.1.2 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures

- 3.1.2.1** As indicated in Part 6 under Security Requirements, the Bidder must provide the full addresses of the Bidder's and proposed individuals' sites or premises for which safeguarding measures are required for Work Performance:

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

- 3.1.2.2** The Company Security Officer must ensure through the Contract Security Program that the Bidder and proposed individuals hold a valid security clearance at the required level, as indicated in Part 6 – Security, Financial and Other Requirements.



PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

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

4.1.1 Technical Evaluation

4.1.1.1 Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to support compliance with this requirement.

Bids which fail to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Requirement Number	Description(s)	Page No. / Paragraph no.	Compliant / not compliant
M-1	The Bidder must provide resumes of all team members that will be working on the project		
M-2	The Bidder must provide a list of studies that provide evidence of experience in conducting surveys of a similar nature.		
M-3	The Bidder must provide two examples of recent reports written by the team lead.		
M-4	The Bidder must provide a breakdown of team members' roles and the number of days each member will spend on each task.		
M-5	The Project Leader must have at least 10 years of experience conducting surveys of a similar nature.		



4.1.1.2 Point Rated Technical Criteria

Proposals will be assessed and awarded points to a maximum of 200 for the technical merit of the proposal and the contractor qualifications. A minimum score of seventy (70) percent is required in each of the technical merit sections and the contractor qualifications sections. Proposals that do not meet the minimum 70 percent in either of these sections will not be considered for contract award.

All bids will be assessed using the following scoring criteria:

A. Bidders Understanding of CSLP, CSGP and Challenges of Surveys	MAX Points
<p>Demonstrated understanding of CSLP (up to 12 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 6 points) • satisfactory (7 to 9 points) • more than satisfactory (10 to 12 points) <p>Demonstrated understanding of the issues surrounding persistence during post-secondary education and loan repayment afterwards (up to 8 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 4 points) • satisfactory (5 to 6 points) • more than satisfactory (7 to 8 points) <p>Demonstrated understanding of Departmental objectives (up to 5 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 2 points) • satisfactory (3 to 4 points) • more than satisfactory (5 points) 	25
<p>Recognition of potential challenges of conducting the survey (up to 10 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 5 points) • satisfactory (6 to 8 points) • more than satisfactory (9 to 10 points) <p>Demonstrated capability to address challenges in meeting goals outlined in Statement of Work (up to 15 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 7 points) • satisfactory (9 to 12 points) • more than satisfactory (13 to 15 points) 	25
<p>Pass mark (Part A): 35 out of 50 points</p>	50



<p>B. Bidders Proposed Execution of Survey</p>	
<p>Methodology</p> <p>Clear demonstration of how questions in this document will be addressed with the methodology proposed (up to 10 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 5 points) • satisfactory (6 to 8 points) • more than satisfactory (9 to 10 points) <p>Detail of methodology that will be used (up to 10 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 4 points) • satisfactory (6 to 8 points) • more than satisfactory (9 to 10 points) 	20
<p>Work plan and time schedule</p> <p>Provide a detailed work plan, clearly indicating steps to be taken from start to end of contract (up to 15 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 7 points) • satisfactory (9 to 12 points) • more than satisfactory (13 to 15 points) <p>Provide a detailed time schedule that meets timeframes identified in Statement of Work (up to 5 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 2 points) • satisfactory (3 to 4 points) • more than satisfactory (5 points) 	20
<p>Adequacy of proposed level of effort (up to 20 points)</p> <ul style="list-style-type: none"> • 0-4 pts for less than satisfactory • 5-12 pts for satisfactory • 13-20 pts for more than satisfactory 	20
<p>Pass mark (Part B): 42 out of 60 points</p>	60



C: Bidders' Organizational Management and Expertise	
<p>Bidders capability to undertake survey (based on previous surveys conducted)</p> <p>Demonstrated ability to logistically organize survey based on number of similar-sized surveys conducted within the last 5 years (up to 1.5 point each, up to 15 points)</p> <p>Demonstrated ability to recruit potential participants for survey based on response rates for similar-sized surveys conducted within the last 5 years (up to 1 point each, up to 10 points)</p> <p>Demonstrated ability to write, organize and format reports clearly, logically and succinctly based on two submitted writing samples of previous reports prepared within the last 2 years (up to 10 points)</p> <ul style="list-style-type: none"> • less than satisfactory (0 to 4 points) • satisfactory (6 to 8 points) • more than satisfactory (9 to 10 points) 	35
<p>Capabilities of project leader to manage survey</p> <p>Demonstrated experience in managing surveys of a similar nature and complexity based on number of similar-sized surveys conducted within the last 5 years (up to 2 points each, up to 20 points)</p> <p>Demonstrated relevant experience in managing projects of a similar nature, complexity and theme over the last 10 years (up to 1 point per project, up to 10 points)</p>	30
<p>Capabilities of the interviewer(s) to conduct survey interviews</p> <p>Demonstrated experience in conducting survey interviews of a similar nature and complexity based on number of similar-sized surveys conducted within the last 5 years (up to 2.5 points each, up to 25 points)</p>	25
Pass mark (Part C): 63 out of 90 points	90
Pass mark (Total): 140 out of 200	200



4.2 Basis of Selection

4.2.1 Basis of Selection - Highest Combined Rating of Technical Merit and Price – SACC - A0027T

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 in the rated technical criteria, and
2. Bids not meeting (a), (b), and (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 90 % for the technical merit and 10% 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 90%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 10%.
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).

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

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60$ = 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

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

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

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

5.1 Certifications Required with the Bid

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

5.1.1 Integrity Provisions - Declaration of Convicted Offences

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

5.2 Certifications Precedent to Contract Award and Additional Information

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

5.2.1 Integrity Provisions – Required Documentation

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

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the



RFP 100013132

[Employment and Social Development Canada \(ESDC\) - Labour's Website](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html)

<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html>

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



PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

1. At the date of bid closing, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
- (d) the Bidder's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
- (e) the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.

Address:

Street Number / Street Name, Unit / Suite / Apartment Number

City, Province, Territory / State

Postal Code / Zip Code Country

6.1.2 For additional information on security requirements, Bidders 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



PART 7 - RESULTING CONTRACT CLAUSES

(Fill in at time of contract award where applicable)

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

7.1 Statement of Work

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

7.2 Standard Clauses and Conditions

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

7.2.1 General Conditions

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

7.2.2 Supplemental General Conditions

4007 (2010-08-16), apply to and form part of the Contract.

4008 (2008-12-12), Personal Information apply to and form part of the Contract.

A9122C (2008-05-12), Protection and security of Data Stored in Databases

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

In connection with giving its consent to locating a database in another country, the Contracting Authority may, at its option, require the Contractor to provide a legal opinion (from a lawyer qualified in the foreign country) that the laws in that country meet the above requirements, or may require the Contractor to pay for Canada to obtain such a legal opinion. Canada has the right to



RFP 100013132

reject any request to store Canada's data in a country other than Canada if there is any reason to be concerned about the security, privacy, or integrity of Canada's data. Canada may also require that any data sent or processed outside of Canada be encrypted with Canada-approved cryptography and that the private key required to decrypt the data be kept in Canada in accordance with key management and storage processes approved by Canada.

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

7.3 Security Requirements

7.3.1 The following security requirements apply and form part of the Contract.

- The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS) with approved Document Safeguarding at the level of Protected B, issued by the Canadian Industrial Security Directorate, Public Services and Procurement Canada
- The Contractor/Offeror personnel requiring access to protected information, assets or work site(s) must EACH hold a valid Reliability Status, granted or approved by the Canadian Industrial Security Directorate (CISD), Public Services and Procurement Canada (PSPC)
- The Contractor must not utilize its Information Technology systems to electronically process, produce or store protected information until the CISD/PSPC has issued written approval. After



approval has been granted or approved, these tasks may be performed up to the level of Protected B

- Subcontracts which contain security requirements are not to be awarded without the prior written permission of CISD/PSPC
- The Contractor/Offeror must comply with the provisions of the:
 - o Security Requirements Check List and security guide (if applicable), attached at Annex C
 - o Industrial Security Manual (Latest Edition)

7.3.2 Contractor's Sites or Premises Requiring Safeguarding Measures

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

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

7.3.2.2 The Company Security Officer must ensure through the [Contract Security Program](#) that the Contractor and individuals hold a valid security clearance at the required level.

7.4 Term of Contract

7.4.1 Period of the Contract

The period of the Contract is from date of Contract Award date to August 31, 2020 inclusive.

7.5 Authorities

7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name:

Title:

Department: Employment Social & Development Canada (ESDC)

Directorate:

Address:

Telephone:

Facsimile:

E-mail address:



RFP 100013132

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

7.5.2 Project Authority

The Project Authority for the Contract is:

Name:

Title:

Department: Employment Social & Development Canada (ESDC)

Directorate:

Address:

Telephone:

Facsimile:

E-mail address:

In its absence, the Project Authority is:

Name:

Title:

Department: Employment Social & Development Canada (ESDC)

Directorate:

Address:

Telephone:

Facsimile:

E-mail address:

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

7.5.3 Contractor's Representative

Name:

Title:

Company:

Directorate:

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.

7.7 Payment

7.7.1 Basis of Payment – Firm Price – C0207C

For the Work described in Section 5 of the Statement of Work in Annex A.

In consideration of the Contractor satisfactorily completing its obligations under the Contract, the Contractor will be paid a firm price for a cost of \$_____. Customs duties are included and Applicable Taxes are extra.

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

7.7.2 Limitation of Price

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

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

7.7.3 Schedule of Milestones – H4012C

The schedule of milestones for which payments will be made in accordance with the Annex B – Basis of Payment

7.8 Invoicing Instructions

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

7.9 Certifications and Additional Information

7.9.1 Compliance



RFP 100013132

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

7.10 Applicable Laws

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

7.11 Priority of Documents

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions;
 - 4007 (2010-08-16), apply to and form part of the Contract.
 - 4008 (2008-12-12), Personal Information apply to and form part of the Contract.
 - A9122C (2008-05-12), Protection and security of Data Stored in Databases;
- (c) the general conditions 2035 (2018-06-21);
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) the Contractor's bid dated _____, clarified on _____ " *or* ",as amended on _____".



ANNEX A STATEMENT OF WORK

1.0 TITLE

Post-study Survey of Student Loan Borrowers for the Canada Student Loans Program Evaluation

2.0 OBJECTIVE

This survey will contact full-time student loan borrowers whose last year of post-secondary education occurred in 2016. The survey will seek to determine the post-education outcomes for student loan borrowers in terms of graduation and ability to repay their student loans. Questions will also be asked to determine how they feel student loans and grants impacted the completion (or non-completion) of their post-secondary education.

The survey would be conducted via telephone, Internet or a combination of the two, and should have an average duration of approximately 25 minutes. It would aim at having responses for 3,000 individuals to be able to provide statistically significant findings for different sub-groups. The aim will be to have results by gender, age group, parental income group, family status (e.g. married, parent), recent immigrant status, disability status, region and urban/rural areas. Gender-based analysis+ results will be outlined where relevant. The purpose of the survey will be to enrich the information collected from other sources in order to address the relevant evaluation questions.

3.0 BACKGROUND

The Canada Student Loans Program (CSLP) was created in 1964 under the Canada Student Loans Act to promote access to post-secondary education for students with a demonstrated financial need by lowering financial barriers through the provision of loans and grants. This ensures Canadians have opportunities to develop the knowledge and skills to participate in the economy and society.

There are four objectives of the program:

1. Maintaining the Government of Canada's commitment to accessibility – making student loans accessible to students with financial need by having policies; service delivery products and platforms; and information that maximizes the accessibility of the program while maintaining program integrity.
2. Making the loan experience a positive one by working to simplify the program for all stakeholders; harmonize it with provincial/territorial programs; and reduce defaults by improving services during the in-study period, repayment and collection phases.
3. Increasing awareness by providing learning and labour market information to aid student borrowers and prospective borrowers in making informed choices. The program will



continue to promote awareness by maintaining contact with borrowers throughout the life of the loan to improve borrower satisfaction and to enhance the loan repayment rate.

4. Ensuring performance, integrity and accountability – improving program results, reducing costs per student assisted, reducing defaults, and decreasing the percentage of loans written off by initiating a default management program; enhancing systems for tracking data; building accountability for reducing defaults into service provider contracts; and improving on-line services to students during the in-study period, during repayment and collections.

The Canada Student Grants Program was implemented in 2009, replacing the former Canada Study Grants, Canada Access Grants and grants/bursaries previously offered by the Canada Millennium Scholarship Foundation.

The Canada Student Grants Program includes grants for low- and middle-income students, full- and part-time students, students with disabilities and students with dependants. The grants are aimed at increasing post-secondary education participation and completion rates – particularly of under-represented groups. The grants are available to students from most provinces and territories except the Northwest Territories, Nunavut and Quebec, which operate their own student financial assistance programs.

The Government of Canada works in partnership with participating provincial and territorial governments to deliver student financial assistance to Canadian students. Applicants for federal and provincial loans and grants are assessed through a single application process. For students receiving loan funding for full-time studies, roughly 60 percent is funded by the Canada Student Loans Program and 40 percent by provincial or territorial student loan programs. Furthermore, the Government of Canada and five participating provinces have signed integration agreements (covering more than 80% of student loan borrowers) to ensure that the federal and provincial student financial assistance programs operate with a common set of rules, principles and assistance measures, so that students receive financial assistance as a single loan product.

The program contracts a private sector Service Provider to manage borrower accounts, which operates under the name “National Student Loans Service Centre”. This is the main point of contact for borrowers in managing their loans and it serves them throughout each phase of the loan cycle, from loan disbursement to repayment, including repayment assistance for those who need it. Borrowers in integrated provinces deal with this service provider as a single point of contact for their federal and provincial student loans.

An evaluation plan has been developed, with a focus on examining how CSLP affects access to post-secondary education and graduation. The evaluation includes a number of lines of evidence, of which this survey is one line of evidence.

4.0 EVALUATION QUESTIONS

A list of evaluation questions that the survey will address is provided below. For each question listed, the Contractor (in consultation with the Project Authority) will design the appropriate sub-questions to fully address the main question.



- What impact do student loans and grants have on the likelihood of a student completing their post-secondary education?
 - Do graduation outcomes differ by group (e.g. gender, age, parental income group, family status (e.g. married, parent), recent immigrant status, disability status, visible minority status, region or Census Metropolitan Area, field of study, and/or student loan debt levels)?
 - How do individual circumstances differ between program recipients and non-recipients during their studies in terms of having to work, having enough time for studying, etc.?
- To what extent are borrowers able to repay their student loans?
 - What is the distribution of student debt loads?
 - What means do borrowers have to repay their student loans?
 - Do outcomes differ by group (e.g. gender, age, parental income group, family status (e.g. married, parent), recent immigrant status, disability status, visible minority status, region or Census Metropolitan Area, field of study, student loan debt levels and education institution type)?

In addition, the survey will help to determine if students had alternatives to finance these studies and if they thought the availability of student loans influenced choices to complete post-secondary education and the type of program they chose.

All of the above questions fall outside of the realm of public opinion research, which in the Government of Canada is defined as the planned gathering, by or for a government institution, of opinions, attitudes, perceptions, judgments, feelings, ideas, reactions and views that are intended to be used for any government purpose, whether that information is collected from persons (including employees of government institutions), representatives of businesses, institutions or other entities, through quantitative or qualitative methods. The above questions will all lead to fact-based answers from the survey respondents.

5.0 SCOPE

The Contractor will be required to conduct a survey of about 20-30 minutes with roughly 3,000 recipients of student loans whose last year of post-secondary education occurred in 2016. The sampled population (by province/territory, gender, and PSE institution type) should be representative of the Canadian population of these CSLP recipients.

The Contractor (in consultation with the Project Authority) will develop the survey questionnaires to cover the issues to be examined, recruit the participants, and provide an experienced bilingual interviewer or a team of experienced interviewers (at least one experienced English-speaking interviewer and at least one experienced French-speaking interviewer) to successfully complete the project. The survey will be conducted by telephone and/or via the Internet (a detailed description of all tasks is provided in Section 6.0 of this document).

The work of the Contractor is expected to be completed by June 15, 2020.



6.0 TASKS/TECHNICAL SPECIFICATIONS

A Contractor will be hired to conduct the survey. Information from the survey will enrich the information collected from other sources for the Evaluation of the Canada Student Loans Program. The Contractor will be expected to work closely with the Project Authority in planning, organizing and conducting the survey. The following tasks are to be performed by the Contractor:

Task 1: Meet with Project Authority and Plan Survey

The Contractor will meet with the Project Authority (or its representative) in order to plan the approach for this project. The Contractor will be expected to be in regular contact with the Project Authority for the duration of the project through weekly communication via telephone or e-mail in order to report on the progress of the project.

The Contractor will be responsible for:

- Providing a detailed methodology report;
- Developing a recruitment plan and invitation procedures for potential survey respondents **(based on the list of prospective participants to be provided by ESDC)**;
- Writing the questions and creating the questionnaires in consultation with ESDC;
- Identifying and providing the personnel and staffing resources for all tasks;
- Identifying the appropriate composition for potential respondents (confirming they are student loan recipients whose last year of post-secondary education occurred in 2016 and ensuring different groups of interest are appropriately represented);
- Developing eligibility and exclusion criteria; and
- Confirming the timeline to ensure that the final report for the survey will be completed on time.

The Contractor will develop the questionnaires for the survey in partnership with the Project Authority. Along with the methodology report and questionnaires, the Contractor will develop a detailed recruitment plan. The recruitment plan will include an introductory statement indicating that the Contractor is working on behalf of ESDC. The recruitment plan will also include asking a few questions to ensure that the survey population is representative of the overall population of these CSLP recipients, as outlined in Section 5.0.

Task 2: Recruit Potential Survey Participants and Conduct Survey

The Contractor will not proceed to the second task until ESDC has approved the methodology report, recruitment plan and questionnaires. The Contractor will be responsible for the recruitment of the survey participants. The specific tasks to be undertaken include the following:

- Recruiting potential survey participants:
 - Informing the potential participant that he or she is a consultant hired by ESDC to carry out the survey;



RFP 100013132

- Informing the potential participant of the reasons for the phone call and/or letter and the objectives of the survey;
- Explaining to the potential participant that all responses will remain anonymous, informing the interviewee that their participation is voluntary, and explaining his/her right of access under the Department of Employment and Social Development act, Privacy Act and any other applicable laws and
- Informing the potential participant of the length of the recruitment plan and the future survey.
- Selecting enough potential participants to ensure that approximately 3,000 completed survey responses are obtained.
- Asking the potential participants about the preferred contact time for the survey interview and/or informing participants about where the survey can be completed online.
- Providing a short analyses (2-3 pages) identifying non-response problems and any potential biases that may result.

Once the recruiting process is completed, the Contractor will be responsible for selecting and employing a skilled bilingual interviewer or a team of experienced interviewers that can work in English and in French.

The specific tasks necessary will include:

- Designing the analysis plan.
- Setting the dates and time for the survey interviews and/or informing participants about where the survey can be completed online.
- Determining and making the follow-up procedures that will ensure participation by making at least two follow-up telephone calls or sending a letter via mail or e-mail (whichever method the Contractor deems to be the most appropriate method for ensuring a high participation rate) pertaining to the date and time of the survey. The phone call/letter/e-mail will explain:
 - The purpose of the survey;
 - The purpose of the data collection;
 - Who will be conducting the data collection;
 - The approximate length of the survey to which their participation is requested;
 - That participation in the survey is voluntary, that no administrative decision about the individual will be made, and that their refusal to participate in the data collection method requested will not impact on services they receive or could receive from ESDC in the future;
 - The legislative authority to collect their personal information and how it will be administered;
 - Their rights under the Department of Employment and Social Development Act, Privacy Act and any other applicable laws; and
 - That if the individual does not agree to participation in the survey, the Contractor shall not conduct data collection and shall mark the record for non-response in the working file. These records will be maintained until the end of the contract by the Contractor, at which time these records will be purged by the Contractor.



- Pre-testing the survey to ensure flow, duration and understanding is adequate.
- Contacting the potential survey participants.
- Conducting the survey.

Potential survey participants will first be asked to confirm their willingness to participate. After receiving confirmation, an experienced interviewer will conduct the survey interviews and/or potential participants will be instructed as to where they can complete the survey online. It is preferable that a limited number of interviewers conduct the survey.

The Contractor will be responsible for collecting the information obtained during the survey.

Before conducting the survey, the Contractor will again inform the participant:

- That the consultant was hired by ESDC to carry out the survey;
- Of the reasons for why the survey is taking place and of its objectives;
- That all responses will be anonymous, informing the survey participant that the survey is voluntary and explaining his/her right of access under the Department of Employment and Social Development Act, Privacy Act and any other applicable laws
- Of the length of the survey;
- That their consent is required before conducting the survey; and
- That personal information will be protected throughout the process.

Audio Taping of Survey

The Contractor may record survey phone calls in order to capture all facets of the discussion, in which case the Contractor will inform the survey participant and obtain consent. The survey participant will also be informed that the audio tape will be kept in a secure location by the consulting firm, and that the data will be retained for less than 30 days, and will subsequently be destroyed by the Contractor and not returned to ESDC. Further, in any reporting, no survey participant will be identified.

Task 3: Prepare Preliminary Draft Report

The Contractor will be responsible for preparing a synthesis preliminary draft report of the survey, highlighting the main issues. The specific tasks to be undertaken will include:

- Organizing the notes, any tapes, transcripts and other information;
- Studying the results to determine the main issues and key conclusions; and
- Preparing a draft of the final report.

The survey will produce a great deal of data that must be sorted, understood, interpreted and summarized. It is essential that no individuals be identified and no specific individual quotes be reported in any synthesis reports which could be reasonably attributed to a specific individual. To ensure that the results and the preliminary draft report are of high quality, the report will go through a peer review.



Task 4: Prepare Final Report and Submit Survey Database

Upon approval of the preliminary draft report, the Contractor will produce a final report that incorporates all requested changes made by the Project Authority and the academic peer reviewer. The final synthesis report will only contain aggregate information – no individuals will be identified. The Contractor will complete and submit the final report to ESDC. The final report will include an Executive Summary and will address all of the evaluation issues and questions mentioned in Section 4.0. The report should not exceed 50 pages. As well, the Contractor must be prepared to meet with ESDC senior management to discuss the results of the survey, if requested.

The Contractor will also submit a database containing the results of the survey to ESDC. The database provided to ESDC should not contain personal identifiers (i.e. contact information) of the individuals. However, it should assign each individual a sequence number and provide their responses in a survey codebook.

The database should be representative of the underlying population. If this is not the case, the survey data must be weighted accordingly.

If a sub-contractor is hired, the sub-contractor must sign an intellectual property form by which the intellectual property rights are deemed to belong to the Government of Canada. The sub-contractor must meet all ESDC security and privacy conditions prior to any involvement in this project and agree to be bound by all terms and conditions of the principal contract.

7.0 Use, Retention, Disposal of Personal Information Collected for the Contract

The Contractor will sign a contract that will include the following privacy clauses:

1. For the purpose of allowing the Contractor to perform the work under the contract, ESDC shall make available to the Contractor, in accordance with the Department of Employment and Social Development Act and other applicable laws governing the protection of information under its control, the following information about CSLP participants, which is described in ESDC's Standard Personal Information Bank: PSU 938 outreach activities:
 - Name;
 - Contact Information (email, address and telephone number);
 - Gender
 - Age
 - Parental income group
 - Family status of the individual (e.g. married, parent)
 - Disability status
 - Post-secondary institution type (e.g. university, college)
2. For the purpose of performing the work under the contract, the Contractor shall collect, on behalf of ESDC, information such as demographic information, attitudes and opinions.



3. The Contractor shall collect the information referred to in section 2 above directly from the individuals to whom that information relates unless the individuals authorize collection from another source or the direct collection of information might result in the collection of inaccurate information.
4. The Contractor shall inform the individuals of the purpose of the collection, including any statutory authority for the collection, of their right to refuse to provide any or all of the requested information and any possible consequence of such refusal, and of their right of access and correction.
5. The Contractor shall make every effort to ensure the accuracy of the information collected pursuant to section 2 above.
6. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor shall not collect, use or disclose the information respectively referred to in sections 1 and 2 except for the purpose of performing the work under the contract.
7. The Contractor shall maintain all information referred to in sections 1 and 2 above, and make sure it is only accessible, in Canada.
8. The Contractor shall segregate all records containing information referred to in sections 1 and 2 above (whether in electronic format or in hard copy) from other records, and keep all databases in which such records are to be maintained physically independent from all other database, directly or indirectly, which are located outside Canada.
9. The Contractor shall ensure that all aspects of the processing of information referred to in sections 1 and 2 above are conducted and only accessible in Canada.
10. The Contractor shall take all necessary measures to ensure that every person it hires, or the services of whom it retains to fulfill its obligations under this contract, knows and complies with all the terms and conditions of this contract with respect to the protection of information referred to in sections 1 and 2 above.
11. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor will ensure that no information referred to in sections 1 or 2 above, is disclosed to a third party for a purpose authorized herein, unless there is a written agreement between the Contractor and the third party, imposing upon the third party obligations that are the same as those that are imposed upon the Contractor under this contract with respect to the protection of this information.
12. The information referred to in sections 1 and 2 above remains at all times under the control of ESDC.



RFP 100013132

13. The information referred to in sections 1 and 2 above is protected by the Privacy Act and any other applicable federal laws governing the protection of personal information held by federal institutions. That information shall be treated as such by the Contractor in accordance with the ESDC Security Policy and Procedures Manual, the Government of Canada Security Policy or other instructions that ESDC may issue.
14. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, the Contractor shall not make any copies of the information referred to in sections 1 and 2 above except with the written consent of ESDC.
15. Unless otherwise required by law or authorized in writing by the individuals to whom that information relates, upon expiry or termination of the contract, whichever is earlier, the Contractor shall return to ESDC the information referred to in sections 1 and 2 above and copies thereof, if any.
16. The Contractor's premises shall be open for inspection by authorized representatives of ESDC at reasonable times to ensure compliance with the provisions of this contract governing the protection of personal information.
17. The Contractor shall notify ESDC immediately after he becomes aware that a breach of any provision of this contract governing the protection of personal information has occurred.
18. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by ESDC.

8.0 SECURITY REQUIREMENTS

- (Company name) personnel requiring access to PROTECTED information, assets or work site(s) must EACH hold a valid RELIABILITY STATUS, granted or approved by the Canadian Industrial Security Directorate (CISD), PWGSC and have a need to know basis for the information.
- Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of CISD/PWGSC or the ESDC Project Authority.
- If the consultant will be working from his premises: The (Company name) has received an "Authority to Operate" letter issued by CISD indicating that (Company name) has been approved to use its IT systems to process, handle and store ESDC's protected information. CISD is to send it to (Company name) the 'Authority to Operate' letter, cc the Project Authority.
- All IT media storing information concerning this contract including any backups made of the contract data, at the completion of this contract are subject to the IT Security Guidance (ITSG) 06 – Clearing and Declassifying Electronic Data Storage Devices.
- Upon termination of the contract, the (Company name) must return all equipment including encrypted USB key provided by the Project Authority including all documents produce.



- The contractor will use only the Departmental approved way of transmission (by encrypted email, secure FTP sites, Departmental approved USB key etc.) to submit the deliverables that contain protected information.
- Ensuring that all GC electronic data at the Protected B, Protected C and classified levels is stored in a GC-approved computing facility located within the geographic boundaries of Canada or within the premises of a GC department located abroad, such as a diplomatic or consular mission. This does not mean that the country of origin of IT service providers must be Canada, as long as these service providers can ensure storage of data within boundaries or premises as described above.

9.0 PERIOD OF CONTRACT

The contract period is from the date of award to August 31, 2020.

10.0 BUDGET

The maximum available budget is \$115,000 (not including GST/QST).



**ANNEX B
BASIS OF PAYMENT**

A list of project deliverables, deadlines and payment information is provided below.

Deliverable	Completion Date	Payment (%)
1. Submit methodology report, recruitment plan and questionnaires	December 31, 2019	15%
2. Recruit survey participants and conduct survey with approximately 3,000 completions	April 1, 2020	0.02% of the overall budget per survey to a maximum of 3,000 completed surveys Example 1: o 0.02 x \$115,000 x 3000 completed surveys = \$69,000 (\$23 per completed survey) Example 2: o 0.02 x 100,000 x 2700 completed surveys = \$54,000 (\$20 per completed survey)
3. Submit preliminary draft report	May 15, 2020	15%
4. Submit final report and survey results database	June 15, 2020	10%
<p>Note: A completion is defined as a survey where at least 75% of the questions have been answered.</p>		

The detailed methodology report and work plan, the survey questionnaires, the preliminary draft report and the final draft report will be supplied to ESDC in electronic format (Microsoft Word). All supporting survey data in tables and charts that go into the reports will also be supplied in electronic format (Microsoft Excel).

**ANNEX C
SECURITY REQUIREMENT CHECK LIST**



Government of Canada

Gouvernement du Canada

Contract Number / Numéro du contrat

100013132

Security Classification / Classification de sécurité

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

Form with sections: 1. Originating Government Department or Organization (ESDC), 2. Branch or Directorate (SSPB/Evaluation), 3. Subcontract Number (To be determined), 3. b) Name and Address of Subcontractor (To be determined), 4. Brief Description of Work (Post-study Survey of Student Loan Borrowers...), 5. a) Will the supplier require access to Controlled Goods? (No/Yes), 5. b) Will the supplier require access to unclassified military technical data... (No/Yes), 6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? (No/Yes), 6. b) Will the supplier and its employees require access to restricted access areas? (No/Yes), 6. c) Is this a commercial courier or delivery requirement with no overnight storage? (No/Yes), 7. a) Indicate the type of information that the supplier will be required to access (Canada, NATO/OTAN, Foreign/Étranger), 7. b) Release restrictions / Restrictions relatives à la diffusion (No release restrictions, Not releasable, Restricted to), 7. c) Level of information / Niveau d'information (PROTECTED A, B, C, CONFIDENTIAL, SECRET, TOP SECRET).



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat
 10003132
 Security Classification / Classification de sécurité

PART A GENERAL PARTIE A GÉNÉRALE

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

No / Non Yes / Oui

2. 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 EMBLEMES | | | |

Special comments:
 Commentaires spéciaux:

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

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

No / Non Yes / Oui
 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 A 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

SECRET



Contract Number / Numéro du contrat 100013132
Security Classification / Classification de sécurité

PARTIE 2 / PARTIE 2 (PARTIE OBLIGATOIRE)

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 RESTRICTION	NATO CONFIDENTIAL	NATO SECRET	COMSEC TOP SECRET / COMSEC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET	
											A	B	C				
Information / Accès		<input checked="" type="checkbox"/>															
Manufacturing / Sites Production																	
IT Assets / Support IT		<input checked="" type="checkbox"/>															
IT Lic. / Lic. Informatique																	

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

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

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

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

