



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

**Canada Revenue Agency
Agence du revenu du Canada**

Proposal to: Canada Revenue Agency

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 and/or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : l'Agence du revenu du Canada

Nous offrons par la présente de vendre à Sa Majesté la Reine du Chef du Canada, en conformité avec les conditions énoncées dans la présente incluses par référence dans la présente et/ou incluses par référence aux annexes jointes à la présente les biens et/ou services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Bidder's Legal Name and Address (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)**

**Bidder MUST identify below the name and title of the individual authorized to sign on behalf of the Bidder –
Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire**

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)
(____)

Telephone No. – No de téléphone
(____)

Fax No. – No de télécopieur

E-mail address – Adresse de courriel

**REQUEST FOR PROPOSAL /
DEMANDE DE PROPOSITION**

Title – Sujet Security Guard Services	
Solicitation No. – No de l'invitation 1000349455	Date 2019-12-20
Solicitation closes – L'invitation prend fin on – le February 7, 2020 at – à 2:00 P.M. / 14 h	Time zone – Fuseau horaire EST/HNE Eastern Standard Time/ Heure Normale de l'Est
Contracting Authority – Autorité contractante Charles Safarian 250 Albert St, 8th Floor Ottawa, Ontario K1A 0L5 charles.safarian@cra-arc.gc.ca	
Telephone No. – No de téléphone (613) 867-4624	
Fax No. – No de télécopieur (613) 948-2459	
Destination - Destination See herein / Voir dans ce document	



Request for Proposal (RFP)

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

Title: Security Guard Services

Part 1 General Information

1.1 Introduction

The solicitation is divided into seven parts plus appendices 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 solicitation;

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

Part 4 Evaluation and 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

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

Appendices

Appendix 1: Mandatory Criteria

Appendix 2: Point Rated Criteria

Appendix 3: Financial Proposal

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

Annexes

Annex A: STATEMENT OF WORK

Annex B: BASIS OF PAYMENT

Annex C: SECURITY REQUIREMENTS

Annex D: CONFIDENTIALITY CERTIFICATION

Annex E: INSURANCE REQUIREMENT



1.2 Summary

The Canada Revenue Agency has the requirement for one Contractor to provide qualified security guards of various ranks, as well as the provision of equipment as required, to ensure fulfillment of service commitments and requirements identified in the Statement of work on a national level.

The anticipated initial contract period will be from April 1, 2020 to March 31, 2022.

The contract will contain irrevocable options to extend the period of the contract by up to four additional years to be exercised in one year increments and options to add or remove services should the CRA Board of Management deem necessary.

1.3 Glossary of Terms

TERM	DEFINITION
CRA	Canada Revenue Agency
Day/Month/Year	For purposes of technical evaluation, one (1) month shall equal a minimum of 16.67 billable days (a day equals 7.5 hours) and one (1) year equals a minimum of 200 billable days. Any additional billable days within the same year will not increase the experience gained for the purposes of evaluation.
Project	A set of activities required to produce certain defined outputs, or to accomplish specific goals or objectives, within a defined schedule and resource budget. A project exists only for the duration of time required to complete its stated objectives.
Proposal	A solicited submission by one party to supply certain goods or services. The word "proposal" is used interchangeably with "bid"
Solicitation	An act or instance of requesting proposals/bids on specific products and/or services.
Tendering Authority	Canada Revenue Agency

1.4 Debriefings

Bidders may request a debriefing on the results of the solicitation process. Bidders should make the request to the Contracting Authority within ten (10) business days of receipt of the results of the solicitation process. The debriefing may be in writing, by telephone or in person.

1.5 Office of the Procurement Ombudsman (OPO)

The Office of the Procurement Ombudsman (OPO) was established by the Government of Canada to provide an independent avenue for suppliers to raise complaints regarding the award of contracts under \$25,000 for goods and under \$100,000 for services. If you have issues or concerns regarding the solicitation, you have the option of raising them with the CRA, or, you may have the option of raising them with the OPO depending upon the nature of the complaint. You may contact the OPO by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.



You can also obtain more information on the OPO services available to you at their website at www.opo-boa.gc.ca

1.6 Canadian International Trade Tribunal

As a general rule, a complaint regarding this procurement process must be filed with the Canadian International Trade Tribunal (the Tribunal) within 10 working days from the date on which a bidder becomes aware, or reasonably should have become aware, of a ground of complaint.

Alternatively, within that time frame, a bidder may first choose to raise its ground of complaint by way of an objection to the CRA; if the CRA denies the relief being sought, a bidder may then file a complaint with the Tribunal within 10 working days of that denial. More information can be obtained on the Tribunal's Web site (www.citt-tcce.gc.ca) or by contacting the Registrar of the Tribunal at 613-993-3595.

Also consult [Recourse Mechanisms \(https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/recourse-mechanisms\)](https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/recourse-mechanisms).



Part 2 Bidder Instructions

2.1 Mandatory Requirements

Wherever the words “shall”, “must” and “will” appear in this document or any related document forming a part hereof, the item being described is a mandatory requirement.

Failure to comply or demonstrate compliance with a mandatory requirement will render the bid non-responsive and the bid will receive no further consideration.

2.1.1 Signatures

Bidders MUST sign Page 1 (front page) of the Request for Proposal and any certifications identified in Part 5.

2.2 Standard Instructions, Clauses and Conditions A0000T (2012-07-16)

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 issued by Public Works and Government Services Canada (PWGSC). The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>.

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

The standard instructions and conditions 2003 (2016-04-04) are incorporated by reference into and form part of the bid solicitation.

The following clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A3005T	Status and Availability of Resources	2010-08-16
A3010T	Education and Experience	2010-08-16
A3015T	Certifications	2014-06-26
C3011T	Exchange Rate Fluctuation	2013-11-06
A9033T	Financial Capability	2012-07-16

2.2.1 Revisions to Standard Instructions 2003

Standard Instructions - Goods or Services – Competitive Requirements 2003 (2016-04-04) are revised as follows.

Section 01 titled “Integrity Provisions– Bid”, is deleted in its entirety and replaced with the following:

1. The *Supplier Integrity Directive* (SID) dated May 24, 2016, is incorporated by reference into, and forms a binding part of the bid solicitation. The Bidder must comply with the SID, which can be found on the Canada Revenue Agency’s website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>



2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier sub-contractors, and other circumstances, will or may result in a determination by Public Works and Government Services Canada (PWGSC) that the Supplier is ineligible to enter, or is suspended from entering into a contract with Canada. The list of ineligible and suspended Suppliers is contained in PWGSC's Integrity Database. The SID describes how enquiries can be made regarding the ineligibility or suspension of Suppliers.
3. In addition to all other information required in the bid solicitation, the Bidder must provide the following:
 - a. by the time stated in the SID, all information required by the SID described under the heading "Mandatory Provision of Information"; and
 - b. with its bid, a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID. The list of foreign criminal charges and convictions must be submitted using an Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
4. Subject to subsection 5, by submitting a bid in response to this bid solicitation, the Bidder certifies that:
 - a. it has read and understands the SID (<http://www.cra-arc.gc.ca/gncy/prcrmnt/menu-eng.html>)
 - b. it understands that certain domestic and foreign criminal charges and convictions, and other circumstances, as described in the SID, will or may result in a determination of ineligibility or suspension under the SID;
 - c. it is aware that Canada may request additional information, certifications, and validations from the Bidder or a third party for purposes of making a determination of ineligibility or suspension;
 - d. it has provided with its bid a complete list of all foreign criminal charges and convictions pertaining to itself, its affiliates and its proposed first tier subcontractors that, to the best of its knowledge and belief, may be similar to one of the listed offences in the SID;
 - e. none of the domestic criminal offences, and other circumstances, described in the SID that will or may result in a determination of ineligibility or suspension, apply to it, its affiliates and its proposed first tier subcontractors; and
 - f. it is not aware of a determination of ineligibility or suspension issued by PWGSC that applies to it.
5. Where a Bidder is unable to provide any of the certifications required by subsection 4, it must submit with its bid a completed Integrity Declaration Form, which can be found at [Declaration form for procurement](#).
6. Canada will declare non-responsive any bid in respect of which the information requested is incomplete or inaccurate, or in respect of which the information contained in a certification or declaration is found by Canada to be false or misleading in any respect. If Canada establishes after award of the Contract that the Bidder provided a false or misleading certification or declaration, Canada may terminate the Contract for default. Pursuant to the SID, Canada may also determine the Bidder to be ineligible for award of a contract for providing a false or misleading certification or declaration.

Section 02 titled "Procurement Business Number", is hereby deleted in its entirety and replaced with:

Suppliers should obtain a Business Number (BN) before contract award. Suppliers may register for a BN online at <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>.



Section 03 titled "Standard Instructions, Clauses and Conditions", "Pursuant to the Department of Public Works and Government Services Act (S.C. 1996, c.16)," is hereby deleted.

Section 05 titled "Submission of Bids", paragraph 2 (d) is deleted in its entirety and replaced with the following:

(d) send its bid only to the Canada Revenue Agency Bid Receiving Unit or to the address specified in the solicitation in Section 2.3.

Section 05 titled "Submission of Bids" paragraph 4, delete sixty (60) days and replace with 120 days.

Section 06, titled "Late Bids", reference to "PWGSC" is hereby deleted and replaced with CRA.

Section 07 titled "Delayed Bids", all references to "PWGSC" are hereby deleted and replaced with "CRA".

Section 12 titled "Rejection of Bid", delete subsections 1(a) and 1(b) in their entirety.

Section 20 titled "Further Information", Paragraph 2 is hereby deleted and replaced with the following: Enquiries concerning receipt of bids may be addressed to the Contracting Authority identified in the bid solicitation.

Section 21 titled "Code of Conduct for Procurement-bid" is hereby deleted in its entirety.

2.3 Submission of Proposals

When responding, the proposal SHALL be delivered to the Bid Receiving Unit address indicated below by the time and date indicated on Page 1.

BIDDERS ARE TO SUBMIT PROPOSALS TO:

Canada Revenue Agency
Bid Receiving Unit
Ottawa Technology Centre
Receiving Dock
875 Heron Road, Room D-95
Ottawa, ON K1A 1A2
Telephone No: (613) 941-1618

Bidders are hereby advised that the Bid Receiving Unit of CRA is open Monday to Friday inclusive, between the hours of 0730 and 1530, excluding those days that the federal government observes as a holiday.

ELECTRONIC BIDS WILL NOT BE ACCEPTED. Due to the nature of this solicitation, electronic transmissions of a proposal by such means as electronic mail or facsimile is not considered to be practical and therefore will not be accepted.



2.4 Communications - Solicitation Period SACC A0012T (2014-03-01)

All enquiries must be submitted to the Contracting Authority no later than **seven** 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 SACC A9070T (2014-06-26)

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

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

2.6 Terms and Conditions

By submitting a bid, the Bidder hereby certifies compliance with and acceptance of all of the articles, clauses, terms and conditions contained or referenced in this Request for Proposal (RFP) and Statement of Work (SOW). Any modifications or conditional pricing by the bidder, including deletions or additions to the articles, clauses, terms and conditions contained or referenced in this RFP and/or SOW document will render the bid non-responsive and the bid will receive no further consideration.



Part 3 Proposal Preparation Instructions

3.1 Bid – Number of Copies CRA MODA0055T (2007-11-30)

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

Section I: Technical Bid (one hard copy and one soft copy)

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 (one hard copy and one soft copy)

Bidders must submit their financial bid in accordance with the format outlined in Appendix 3: Financial Proposal. The total amount of Applicable Taxes must be shown separately.

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

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

Section III: Certifications (one hard copy and one soft copy)

Bidders must submit the certifications required under Part 5.

Section IV: Additional Information (one hard copy and one soft copy)

3.2 Bid Format and Numbering System CRA MODA0054T (2007-11-30)

Canada requests that bidders follow the format instructions described below in the preparation of their bid.

- a. use 8.5 x 11 inch (216 mm x 279 mm) paper;
- b. use recycled-fibre content paper and two-sided printing. Reduction in the size of documents will contribute to CRA's sustainable development initiatives and reduce waste;
- c. avoid the use of colour and glossy formats;
- d. use a numbering system corresponding to that of the bid solicitation;
- e. include the certification as a separate section of the bid.



Part 4 Evaluation and Selection

4.1 General

A committee composed of representatives of CRA will evaluate the proposals on behalf of the Agency. The services of independent consultants may be called upon to assist in the evaluation of, or in the validation of, specific aspects of the solution proposed. CRA reserves the right to engage any independent consultant, or use any Government resources, which it deems necessary to evaluate any proposal.

Proposals will be evaluated in accordance with the evaluation criteria identified in Appendix 1: Mandatory Criteria, Appendix 2: Point Rated Criteria and in conjunction with the Statement of Work (SOW). Bidders are encouraged to address these criteria in sufficient depth in their proposals to permit a full evaluation of their proposals. The onus is on the Bidder to demonstrate that it meets the requirements specified in the solicitation.

Bidders are advised that only listing experience without providing any supporting information to describe where and how such experience was obtained will not be considered to be demonstrated for the purpose of the evaluation. The Bidder should not assume that the evaluation team is necessarily cognizant of or knowledgeable about the experience and capabilities of the Bidder or any of the proposed resource(s); as such, any relevant experience must be demonstrated in the Bidders' written proposal.

4.2 Steps in the Evaluation Process

The selection process to determine the successful Bidder will be carried out as follows:

Notwithstanding Steps 1 and 2 below, in order to expedite the evaluation process, CRA reserves the right to conduct Step 3 - Evaluation of Financial Proposals concurrently with Steps 1 and 2. Should CRA elect to conduct Step 3 prior to the completion of Step 2, the information in the Financial Proposal will not be disclosed to the team evaluating the mandatory and rated sections until the completion of Steps 1 and 2. However, if the Contracting Authority is able to ascertain that a proposal is non-responsive by virtue of incomplete information or an error in the financial proposal, the Contracting Authority will advise the team evaluating the mandatory and rated sections that the proposal is not compliant and should no longer be considered. The concurrent evaluation of the financial proposal does not in any way construe compliance in Steps 1 and 2 despite the statement "All bids meeting the minimum thresholds in Step 2 will proceed to Step 3".

Bids will be ranked in accordance with the Selection Methodology.

Step 1 – Evaluation against Mandatory Criteria

All bids will be evaluated to determine if the mandatory requirements detailed in Appendix 1 "Mandatory Criteria" have been met. Only those bids meeting ALL mandatory requirements will then be evaluated in accordance with Step 2 below.

Step 2 – Evaluation against Point-Rated Criteria

All bids meeting the criteria from Step 1 will be evaluated and scored, in accordance with the point-rated criteria detailed in Appendix 2 "Point-Rated Criteria", to determine the Bidder's Total Technical Merit Score. All bids meeting the minimum thresholds in Step 2 will proceed to Step 3.



Step 3 – Evaluation of Financial Proposals

Only technically compliant bids meeting all of the requirements detailed in Steps 1 and 2 will be considered at this point.

Prices submitted will be evaluated to determine the bid evaluation price as defined in Appendix 3: “Financial Proposal”. Once the bid evaluation prices are determined under Step 3, the proposals will proceed to Step 4.

Bidders must provide a price, percentage, or weight, as applicable, for each item identified in the format specified in Appendix 3: Financial Proposal. Ranges (e.g., \$10-\$13) are not acceptable.

Should there be an error in the extended pricing of the Bidder’s proposal, the unit pricing and rates shall prevail and the extended pricing shall be corrected in the evaluation. Any errors in quantities of the Bidder’s proposal shall be changed to reflect the quantities stated in the RFP.

Failure or refusal to provide a price or rate for any item in Appendix 3, shall be considered as failing to meet a mandatory requirement of the RFP and therefore, the Bidder’s proposal shall be given no further consideration.

Step 4 – Basis of Selection

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

To be declared responsive, a bid must:

- a. comply with all the requirements of the bid solicitation; and
- b. meet all mandatory criteria; and
- c. obtain the required minimum of 133 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 221 points.

Bids not meeting (a) or (b) or (c) will be declared non-responsive.

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. 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%**. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of **40%**. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

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

Step 5 – Proof of Synergy Compliance (PoSC)

The highest ranked responsive Bidder will be subject to Proof of Synergy Compliance testing (PoSC) as described in Annex A-10: Synergy Solution prior to contract award. The CRA reserves the right to test the proposed solution in whole or in part against all of the PoSC test requirements set out in Annex A-10.

Claims of future compliance with CRA’s Synergy requirements in software and/or hardware releases will not be considered during the evaluation of the Bidder’s proposal.

The Bidder with the highest ranked responsive bid and having passed all of the steps above will be considered the successful Bidder for this requirement and will be recommended for award of a contract.

Step 6 – Conditions Precedent to Contract Award

The Bidder(s) recommended for award of a Contract must meet the requirements provided in Part 5 “Certifications and Additional Information” and Part 6 “Security, Financial and Other Requirements” of this RFP.

Step 7 – Contract Entry

The Bidder with the highest ranked responsive bid and meeting all the requirements listed above will be recommended for award of a contract.



Part 5 Certifications and Additional Information

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

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

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

The Certifications listed at 5.1 must be completed and submitted with the bid. Failure to submit the Certifications listed at 5.1 will render the bid non-responsive and the bid will receive no further consideration.

5.1 Certifications Required To Be Submitted At Time of Bid Closing

5.1.1 Joint Venture Certification

Only complete this certification if a joint venture is being proposed

The Bidder represents and warrants the following:

(a) The bidding entity is a contractual joint venture in accordance with the following definition. A "contractual joint venture" is an association of two or more parties who have entered into a written contract in which they have set out the terms under which they have agreed to combine their money, property, knowledge, skills, time or other resources in a joint business enterprise, sharing the profits and the losses and each having some degree of control over the enterprise.

(b) The name of the joint venture is: _____(if applicable).

(c) The members of the contractual joint venture are (the Bidder is to add lines to accommodate the names of all members of the joint venture, as necessary):

(d) The Business Numbers (BN) of each member of the contractual joint venture are as follows (the Bidder is to add lines for additional BNs, as necessary):

(e) The effective date of formation of the joint venture is: _____

(f) Each member of the joint venture has appointed and granted full authority to _____ (the "Lead Member") to act on behalf of all members as its



representative for the purposes of executing documentation relating to the solicitation and any resulting contract.

(g) The joint venture is in effect as of the date of bid submission.

This Joint Venture Certification must be signed by each member of the joint venture.

The Joint Venture Certification shall be effective throughout the entire period of the Contract, including any exercised option period, if exercised.

The CRA has the right to request documentation from the Bidder evidencing the existence of the contractual joint venture.

Signature of an authorized representative of each member of the joint venture

(the Bidder is to add signatory lines as necessary):

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date

_____	_____	_____	_____
Signature of Duly Authorized Representative	Name of Individual (Please Print)	Legal Name of Business Entity	Date



5.2 Certifications Precedent to Contract Award and Associated Information

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to comply with the request of the Contracting Authority and to provide the certification within the time frame provided will render the bid non responsive and the bid will receive no further consideration.

5.2.1 Integrity Provisions – Associated Information

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

5.2.2 Employment Equity

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 (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from [Employment and Social Development Canada \(ESDC\)-Labour's](#) website

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. 5.2.3 Former Public Servant CRA Mod A3025T 2014-06-26

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

Definitions:

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

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



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

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

Former Public Servant in Receipt of a Pension

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

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

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports.

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.

5.2.4 Vendor Reporting Information

The following information should be provided to enable CRA compliance with paragraph 221(1)(d) of the Income Tax Act, R.S.C. 1985, c.1 (5th Supp.) and report payments made to contractors under applicable services contracts (including contracts involving a mix of goods and services) on a T1204 Government Service Contract Payments slip.

For the purpose of this clause:

“Legal Name” means the name of the company, corporation or other entity constituted as a legal person under which this person exercises its rights and performs its obligations.

“Operating Name” means the name that is legally protected and used in the course of its business by a company, corporation or other entity legally constituted as a legal person, or by the individual.

The Bidder is requested to provide the following:

Legal Name: _____

Operating Name: _____

Address: _____

Payment/T1204 Address (if different) Payment address is same as above _____

City: _____

Province: _____

Postal Code: _____

Telephone: _____

Fax: _____



Type of Business (Select only one)

- Corporation
- Partnership
- Sole Proprietor
- Non-Profit Organization
- US or International Co.

All registered companies (excluding Non-Profit organizations and US or International companies) must provide their Goods and Services Tax (GST) or Business Number (BN). Additional details on how to obtain a BN can be found at: <http://www.cra-arc.gc.ca/tx/bsnss/tpcs/bn-ne/menu-eng.html>

If the services will be rendered by an individual, please provide the Social Insurance Number (SIN).

Goods and Services Tax (GST) Number: _____

Business Number (BN): _____

If a SIN number is being provided, the information should be place in a sealed envelope marked "Protected".

Social Insurance Number (SIN): _____

N/A Reason: _____

Note: If you select "N/A", then you must give a reason.

Date: _____

Name: _____

Signature: _____

(Signature of duly authorized representative of business)

Title: _____

(Title of duly authorized representative of business)



Part 6 Security, Financial and Other Requirements

6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Model Contract;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work site(s) must meet the security requirements as indicated in Part 7 - Model Contract;
 - (c) the Bidder must provide the names of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.



Appendices

Appendix 1: Mandatory Criteria

Evaluation Procedures

Bids will be evaluated in accordance with the process outlined in Part 4 Evaluation and Selection and all the mandatory evaluation criteria detailed below. The Bidder must provide supporting documentation in its proposal as requested by CRA, in order to demonstrate that each technical mandatory requirement has been met. To assist with the evaluation process, it is preferred that the Bidder complete the table included below, to indicate where in its proposal the information can be located. Bids that fail to meet all mandatory requirements will be declared non-responsive and the bid will receive no further consideration.

MANDATORY TECHNICAL REQUIREMENTS

Mandatory Criteria	Met	Not Met
<p>1. The Bidder MUST be licensed to provide security guard services in Canada, in accordance with provincial regulations. A copy of each provincial license MUST be submitted with the proposal. Should a copy of any license be missing from the Bidder's proposal, the Contracting Authority will contact the Bidder to request the missing copy(ies), along with a deadline for when the missing copy(ies) must be submitted to the Contracting Authority. Failure to respect the deadline will result in the Bidder's proposal being non-compliant</p>		
<p>2. The Bidder MUST demonstrate that they have been a licensed security company for a minimum of five consecutive years preceding the closing date of the Request for Proposal, performing security guard services similar in scope to the services described in Annex A: Statement of Work. This can be demonstrated through copies of licenses to operate as a security guard provider, which show dates in operation without gaps in service,</p>		
<p>3. The CRA currently anticipates the number of Security Guards (guards at post, escort guards, alarm response guards, preventive patrol guards, lock/unlock and Security Monitoring centre guards) required for approximately 150,000 hours annually. The Bidder MUST demonstrate that it has provided at least 150,000 hours of security guard services annually, similar in scope to the services described in Annex A: Statement of Work within the last 36 months proceeding the closing date of the Request for Proposal.</p> <p>The Bidder MUST provide as many references (primary and secondary) as required to demonstrate the required experience. For each external client identified, the Bidder MUST provide a client reference (primary and secondary contact) that can verify the experience claimed in its proposal. The Bidder should include the client contact name and email address.</p> <p>Only one CRA client contact under each project/contract proposed will be considered.</p> <p>The client reference provided by the Bidder may be contacted, in writing, by the CRA to verify information submitted in the Bidder's proposal. Should there be</p>		



<p>discrepancies between information submitted by the Bidder in its proposal and information provided by the client reference, the information provided by the client reference will take precedence. The details of the referenced project/contract provided in the Bidder's proposal may be shared with the client references in order to facilitate their verification.</p> <p>For each referenced project/contract, the Contracting Authority may contact the primary client contact by email for project/contract verification and the primary client contact will have a 72 business hour period to respond to the Contracting Authority in writing. If unsuccessful, the Contracting Authority will make the same attempt as above to contact the secondary client contact. If still unsuccessful, the CRA, at its sole discretion, may deem the Bidder non-compliant.</p> <p>Once a response is received from the secondary client contact, the secondary client contact's response will take precedence even if the CRA receives a response from the primary client contact at a later date.</p>		
<p>4. The Bidder MUST currently be qualified for Phases I and II of the Canadian General Standards Board's Qualification Program Lists CAN/CGSB-133.1-2017.</p>		
<p>5. The Bidder MUST propose one Regional Contractor Representative for each of the six Canada Revenue Agency regions</p> <ol style="list-style-type: none"> 1. The Bidder's proposed Contractor Representatives MUST have a minimum of five years experience in the security guard services industry, managing the provision of security guard services that are similar in scope to the services described in Annex A: Statement of Work. 2. The Bidder's proposed Contractor Representatives MUST have successfully completed the Basic Training Standard, which includes but is not limited to all aspects of CAN/CGSB-133.1-99 or 2008 or 2017 Security Guards and Security Guard Supervisors. 3. The Bidder MUST provide the names, position titles and Curriculum Vitae (CV) of each proposed Contractor Representatives, and proof of successful completion of the Basic Training Standard, which must contain all necessary information to assess the proposed Contractor Representatives. 		



Appendix 2: Point Rated Criteria

Technical bids will be assessed separately against the evaluation criteria identified below. Point-rated criteria not addressed in the bid will result in a score of zero being assigned against that particular criterion.

To be declared responsive, Bidders must obtain the required minimum of 133 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 221 points

	Criteria	Maximum Available Points	Rating Scale
P1	<p>Experience as a Licensed Security Guard Provider</p> <p>The Bidder’s proposal should detail the length of time the Bidder has been in business as a licensed security guard provider.</p> <p>The length of time will be calculated from the date of issue of the first licence to the closing date of the RFP.</p> <p>Copies of all licences obtained by the Bidder should be submitted with the proposal to adequately calculate the number of years the Bidder has been in business as a licensed security guard provider.</p> <p>Any gap or break between licences will not be counted. If a gap or break between licences exists, only continuous licences up to the closing date of the RFP will be counted.</p>	28 Points	<p>The Bidder’s proposal demonstrates the Bidder has been in business as a licensed security guard provider for:</p> <p>0 Points – 5 years or less 17 Points - 5+ years to 10 years 25 Points – 10+ years to 15 years 28 Points - More than 15 years</p>
P2	<p>Bidder References</p> <p>The Bidder should identify two of its major Client contracts where they provided security guard services</p>	24 Points	<p>Client #1 and #2 (scored separately, maximum 12 points each)</p> <p>Size (Maximum 2 points per project)</p>



<p>similar in scope to the services described in Annex A Statement of Work within the last the last fifteen (15) years.</p> <p>The Bidder should provide the following information:</p> <ol style="list-style-type: none"> 1. Name of client organization. 2. Names and e-mail addresses of a primary and secondary client contact. 3. The Bidder's roles and responsibilities for the referenced contracts. <p>The characteristics of a contract that are considered of "similar nature and size" are:</p> <p>Size: Same number of locations or more locations and same number of annual guard hours or more annual guard hours.</p> <p>Nature: Contract included a requirement for Guards at posts and escort guards and at least one of following three guard services:</p> <ol style="list-style-type: none"> 1. Lock/Unlock 2. Alarm response guards 3. Preventive patrol guards. <p>Referenced contracts will be the subject of a written validation process to named references by the CRA Evaluation Team to corroborate the information provided by Bidders with respect to their relevance to the above contracts characteristics, and to validate the Bidder's success or failure. The Evaluation Team will also ask the named reference the four questions listed below.</p> <ol style="list-style-type: none"> 1) Were you able to communicate personally and readily with the Contractor representative(s)? 		<p>0 Points – Referenced project size was not addressed. 1 Points – Referenced project involved a smaller number of locations and annual guard hours than the current requirement. 2 Points – Referenced project involved a number of locations and annual guard hours equal to or higher than the current requirement.</p> <p>Nature (Maximum 2 points per project) 0 Points - Referenced project nature was not addressed. 1 Points – Referenced project nature was less complex than current requirement. 2 Points – Referenced project nature was as complex as or more complex than the current requirement.</p> <p>Reference Check (Maximum of 2 point per question for a maximum of 8 points per reference)</p> <p>0 Points - No 1 Point - Somewhat 2 Points - Yes</p> <ol style="list-style-type: none"> 1) Were you able to communicate personally and readily with the Contractor representative(s)? 2) Did the Contractor comply with the terms of the Contract? 3) Did security guards consistently arrive on time? 4) Were you satisfied with the Contractor's overall performance?
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	<p>2) Did the Contractor comply with the terms of the Contract? 3) Did security guards consistently (90% to 95%) arrive on time? 4) Were you satisfied with the Contractor's overall performance?</p> <p>Only three (3) attempts over a maximum five (5) working-day period from the first attempt to contact the reference will be made by the evaluators. If unsuccessful, the Bidder will receive 0 points for this criterion.</p>		
<p>P3</p>	<p>Changes to Operational Demands</p> <p>The Bidder's proposal should demonstrate the Bidder's ability to address changes in operational demands and service levels such as:</p> <ol style="list-style-type: none"> 1. Change in number of guards required. 2. Change in number of hours or timing of requirements. 3. Response to short notice requirements of escort guards (less than five (5) hours' notice). 4. Increase or decrease or change in number of locations. 5. Changes in security clearance requirements. <p>The Bidder can propose additional changes in operational demands and service levels not already identified above. Each additional item proposed will be worth one (1) additional point up to a maximum of three (3) additional points.</p> <p>Previous projects (or new projects proposed if the two indicated above had no changes in operational</p>	<p>27 Points</p>	<p>0 Points - The Bidder's proposal does not contain any project references which would demonstrate the Bidder's ability to address changes in operational demands and services levels.</p> <p>The Bidder's proposal demonstrates the Bidder's ability to address changes in operational demands and services levels through project references in:</p> <p>6 Points - Change in number of guards required, OR Change in number of hours or timing of requirements, OR Response to short notice requirements of escort guards (less than five (5) hours notice).</p> <p>12 Points - Two (2) of: -Change in number of hours or timing of requirements; -Change in number of guards required; -Response to short notice requirements of escort guards (less than five (5) hours notice)</p> <p>18 Points - All three (3) of: -Change in number of hours or timing of requirements; -Change in number of guards required; -Response to short notice requirements of escort guards (less than five (5) hours notice)</p>



<p>requirements) should be used as reference in support of the above.</p> <p>The Bidder should provide as many references (primary and secondary) as required to demonstrate the required experience. For each external client identified, the Bidder must provide a client reference (primary and secondary contact) that can verify the experience claimed in its proposal. The Bidder should include the client contact name and email address.</p> <p>The client reference provided by the Bidder may be contacted, in writing, by the CRA to verify information submitted in the Bidder's proposal. Should there be discrepancies between information submitted by the Bidder in its proposal and information provided by the client reference, the information provided by the client reference will take precedence. The details of the referenced project/contract provided in the Bidder's proposal may be shared with the client references in order to facilitate their verification.</p> <p>For each referenced project/contract, the Contracting Authority may contact the primary client contact by email for project/contract verification and the primary client contact will have a 72 business hour period to respond to the Contracting Authority in writing. If unsuccessful, the Contracting Authority will make the same attempt as above to contact the secondary client contact. If still unsuccessful, the CRA, at its sole discretion, may deem the Bidder non-compliant.</p> <p>Once a response is received from the secondary client contact, the secondary client contact's response will</p>		<p>The Bidder's proposal demonstrates the Bidder's ability to address changes in operational demands and services levels through project references in:</p> <p>3 Points - Increase or decrease or change in number of locations, OR Changes in security clearance requirements</p> <p>6 Points - Both of: -Changes in security clearance requirements -Increase or decrease or change in number of locations</p> <p>1 additional point per new change identified - The Bidder's proposal contains additional changes in operational demands and service levels not identified herein (up to a maximum of three (3) additional points).</p>
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	take precedence even if the CRA receives a response from the primary client contact at a later date.		
P4	<p>Harassment and Discrimination</p> <p>The Bidder's proposal should demonstrate that the Bidder has in place policies and training with regard to deterring harassment and discrimination in the workplace. The policies and training should cover the following items:</p> <ol style="list-style-type: none"> 1. Defined harassment 2. Harassment and discrimination course for new employees 3. Refresher course for existing employees 4. Prevention techniques 5. Prompt resolution methods 6. Mediation 7. Corrective and disciplinary measures <p>In order for the CRA to evaluate this criterion, a copy of the Bidder's policies and training material should be submitted with the proposal.</p>	9 Points	<p>0 Points - The Bidder's proposal does not contain any policies and training with regard to deterring harassment and/or discrimination in the workplace.</p> <p>2 Points - The Bidder's proposal demonstrates that the Bidder has in place policies and training with regard to deterring harassment and/or discrimination in the workplace, but they do not cover any of the listed items.</p> <p>The Bidder's proposal demonstrates that the Bidder has in place policies and training with regard to deterring harassment and/or discrimination in the workplace, which cover:</p> <p>3 Points - 1 of the listed items 4 Points - 2 of the listed items 5 Points - 3 of the listed items 6 Points - 4 of the listed items 7 Points - 5 of the listed items 8 Points - 6 of the listed items 9 Points - 7 of the listed items</p>
P5	<p>Transition of Services - Experience</p> <p>The Bidder's proposal should reference up to three current or former clients for which the Bidder took over provision of security guard services similar in scope to Annex A: Statement of Work from another service provider.</p> <p>Each reference should contain the following:</p> <ol style="list-style-type: none"> 1. Name of client organization. 	15 Points	<p>0 Points - The Bidder's proposal does not contain any client references where the Bidder took over provision of security guard services similar in scope to the current requirement from another service provider.</p> <p>The Bidder's proposal contains</p> <p>3 Points - 1 client reference 5 Points - 2 client references 6 Points - 3 client references</p>



<p>2. Names and e-mail addresses of a primary and secondary client contact.</p> <p>Referenced clients will be the subject of a validation process to confirm the Bidder's success or failure. The named reference will be contacted in writing to confirm whether the transition of services from the previous service provider to the Bidder was negative, neutral or positive.</p> <p>Previous projects (or new projects proposed if the three indicated above had no transition of services requirement) should be used as reference in support of the above.</p> <p>Should there be discrepancies between information submitted by the Bidder in its proposal and information provided by the client reference, the information provided by the client reference will take precedence. The details of the referenced project/contract provided in the Bidder's proposal may be shared with the client references in order to facilitate their verification.</p> <p>For each referenced project/contract, the Contracting Authority will contact the primary client contact by email for project/contract verification and the primary client contact will have a 72 business hour period to respond to the Contracting Authority in writing. If unsuccessful, the Contracting Authority will make the same attempt as above to contact the secondary client contact. If still unsuccessful, the CRA, at its sole discretion, may deem the Bidder non-compliant.</p> <p>Once a response is received from the secondary client contact, the secondary client contact's response will</p>		<p>where the Bidder took over provision of security guard services from another service provider and the referenced client(s) verified the information.</p> <p>Reference Check (<i>Maximum of 3 points per client reference for a maximum of 9 points</i>)</p> <p>0 Points - Negative 1 Points - Neutral 3 Points - Positive</p>
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	take precedence even if the CRA receives a response from the primary client contact at a later date.		
P6	<p>Quality Management System</p> <p>The Bidder should describe the Bidder’s proposed Quality Management System (QMS) and how the proposed QMS is designed to ensure the provision of qualified, well trained security guards in a timely manner.</p> <p>The Bidder should describe the Bidder’s Quality Management Plan (QMP) and how the QMP will allow the Bidder’s QMS to adapt and evolve to enhance the Bidder’s service delivery.</p> <p>The Bidder should provide a brief summary of how the proposed QMS is designed to ensure the provision of qualified, well trained and well groomed (personal appearance and uniform) security guards in a timely manner.</p> <p>If the Bidder is ISO 9000 series certified, the Bidder is requested to provide a copy of its certification.</p>	28 Points	<p>Quality Management System (QMS)</p> <p>0 Points - Bidder does not address a QMS or does not have a QMS.</p> <p>5 Points – Bidder’s proposed QMS is informal, reactive, not documented or not certified and may not ensure (less than 50%) provision of qualified and well-trained security guards in a timely manner.</p> <p>11 Points – Bidder’s proposed QMS will ensure consistent provision of qualified and well-trained security guards and is formal, proactive and documented, but is not a certified QMS.</p> <p>15 Points – Bidder’s proposed QMS will ensure consistent high service quality and is formal, proactive, has an industry recognized non-ISO 9000 series certification and is documented.</p> <p>18 Points – Bidder’s proposed QMS will ensure consistent high service quality and is formal, proactive, ISO 9000 series certified and is documented.</p> <p>Quality Management Plan (QMP)</p> <p>0 Points – Bidder does not address a QMP or does not have a QMP.</p> <p>4 Points – Bidder’s proposed QMP does not demonstrate how it will adapt and evolve to enhance the Bidder’s service delivery.</p> <p>7 Points – Bidder’s proposed QMP demonstrates how it will adapt and evolve to enhance the Bidder’s service delivery.</p> <p>10 Points – Bidder’s proposed QMP is customized for the CRA, proactive and will adapt and evolve to enhance the Bidder’s service delivery.</p>
P7	Contingency Plan	10 Points	0 Points - The Bidder’s proposal does not contain a contingency plan



	<p>The Bidder's proposal should contain a contingency plan to continue delivering services during a complication such as, but not limited to: shortage of guards, a strike by the Bidder's personnel, communications failure, equipment malfunction.</p> <p>The contingency plan should include the following steps:</p> <ol style="list-style-type: none"> 1. Contingency plan developed by a team representing all functional areas of the organization. 2. A list of potential complications that could affect normal provision of services is established. 3. Outlined processes/strategies which deal with the immediate aftermath of the crisis. 4. Key individuals who should be familiar with their duties under the plan are identified. 5. Contingency plan has been tested. 6. Provisions are made for all personnel to be made aware of the plan and of its contents and their own related duties and responsibilities. 7. An individual is assigned to ensure the plan is maintained and updated regularly. <p>The Bidder can propose additional or other steps not identified above. Each additional step proposed will be worth one additional point up to a maximum of three additional points.</p>		<p>The Bidder's proposal contains a contingency plan which includes:</p> <p>1 Points - 1 of the steps listed 2 Points - 2 of the steps listed 3 Points - 3 of the steps listed 4 Points - 4 of the steps listed 5 Points - 5 of the steps listed 6 Points - 6 of the steps listed 7 Points - All 7 of the steps listed</p> <p>1 additional point per new step identified - The Bidder's proposal contains additional or other steps within the Bidder's contingency plan (up to a maximum of three additional points)</p>
P8	<p>Implementation Plan</p> <p>The Bidder should describe the Bidder's implementation plan that will be utilized to ensure that the Bidder would be operational in delivering the Security Guards requirement at the start date of the contract.</p> <p>This implementation plan should include details on the following:</p> <ol style="list-style-type: none"> 1. proposed steps, 	<p>10 Points</p>	<p>0 points - the implementation plan is not addressed:</p> <p>4 points - the implementation plan is unsatisfactory (only one item is addressed*)</p> <p>6 points - the implementation plan is satisfactory (2 or 3 items are addressed*)</p>



	<ol style="list-style-type: none"> 2. associated schedules and timeframes, 3. start-up requirements, 4. number of the Bidder's resources required and any related responsibilities of such resources, 5. contingency plans and 6. description of similar implementation plans that the Bidder has previously executed. 		<p>8 points - the implementation plan is well addressed (4 to 5 items are addressed)</p> <p>10 points - the response is outstanding (all 6 items are addressed")</p> <p>*addressed – The Bidder provided sufficient detail that the implementation plan proposed was deemed clear, sound and comprehensive.</p>
P9	<p>Employee Recruitment and Retention Program</p> <p>The Bidder's proposal should describe the Bidder's proposed methodology for ensuring the recruitment and retention of trained and qualified security guards.</p> <p>The Bidder's proposed methodology should demonstrate, but not be limited to, the following:</p> <ol style="list-style-type: none"> 1) How the Bidder will ensure that they recruit and retain a sufficient number of security guards to meet CRA requirements on an on-going basis in a timely manner. 2) How successful the Bidder's retention program is. 3) The Bidder's plan to secure guards dedicated specifically to this requirement. 4) How the Bidder will ensure the same guards are scheduled at the same locations. 	15 Points	<p>0 points - the methodology does not address* any of the items.</p> <p>6 points - the methodology is unsatisfactory (only 1 item is addressed*)</p> <p>9 points - the methodology is satisfactory (2 item are addressed*)</p> <p>12 points - the methodology is well addressed (3 item are addressed*)</p> <p>15 points - the methodology is outstanding (all four item are addressed*)</p> <p>*addressed – The Bidder provided sufficient detail that the Employee Recruitment and Retention Program proposed was deemed clear, sound and comprehensive.</p>
P10	<p>Security Alarm Response</p> <p>The Bidder should describe the approach the Bidder will take to respond to security alarms within a thirty (30) minute timeframe at multiple locations in a metropolitan</p>	15 Points	<p>0 points - the approach does not address* any of the items mentioned</p> <p>6 points - the approach is unsatisfactory (only 1 item is addressed*)</p>



	<p>area (for example: Montreal, QC), as well as alarms at more isolated locations (for example: Prince George, BC)</p> <p>The Bidder's approach should include, but not be limited to the following:</p> <ol style="list-style-type: none"> 1) Timelines 2) Impact on CRA resources 3) Increased or decreased risk to CRA 		<p>9 points - the approach is satisfactory (2 items are addressed*)</p> <p>12 points - the approach is well addressed (3 items are addressed*)</p> <p>15 points the approach is outstanding and/or exceptional (all 3 items are addressed* and other items of value are added</p> <p>*addressed – The Bidder provided sufficient detail that the Security Alarm Response approach proposed was deemed clear, sound and comprehensive .</p>
P11	<p>Lock/Unlock service</p> <p>The Bidder should describe the approach the Bidder will take to provide the lock/unlock service at multiple locations in a metropolitan area (for example: Montreal, QC), as well as alarms at more isolated locations (for example: Prince George, BC)</p> <p>The Bidders approach should include but not limited to</p> <ol style="list-style-type: none"> 1) How the Bidder will provide the service on a daily basis; 2) How the Bidder will cover book offs (when the security guard meant to fill the position books off). 	10 Points	<p>0 points -the response is unsatisfactory or a nil response</p> <p>7 points - the approach is satisfactory (2 items addressed*)</p> <p>10 points - the approach is well addressed (3 items are addressed*)</p> <p>*addressed – The Bidder provided sufficient detail that the Lock/Unlock service approach proposed was deemed clear, sound and comprehensive.</p>
P12	<p>Security Monitoring Room</p> <p>The Bidder should describe the approach the Bidder will take to provide trained guards in the Security Monitoring Centre located in Surrey, BC and Sudbury, ON.</p> <p>The Bidder's approach should include but not limited to:</p> <ol style="list-style-type: none"> 1) How it will provide guards with experience working in an alarm room 	30 Points	<p>0 points - the response is unsatisfactory or a nil response, the Bidder will be awarded for this criterion.</p> <p>15 points the approach is satisfactory (2 items are addressed*)</p> <p>25 points the approach is well addressed (3 items are addressed)</p> <p>30 points - the approach addresses all items identified</p>



	2) Its ability to provide guards with Kantech and Chubb AFx knowledge 3) Its ability to provide bilingual guards at these two sites 4) Its ability to provide guards fully trained on Microsoft Office (Word, Excel, Outlook)		*addressed – The Bidder provided sufficient detail that the Security Monitoring Room approach proposed was deemed clear, sound and comprehensive.
Total Number of Points Achievable:		221 Points	
Minimum Points Required		133 Points	



Appendix 3: Financial Proposal

The Bidder must submit their financial bid in accordance with the “Financial Bid Presentation Sheet” (detailed below). Bidders must submit firm, all-inclusive hourly and unit rates in Canadian funds, Applicable Taxes excluded, for each resource category and service category listed below. The prices specified include all of the requirements defined in Annex A, “Statement of Work”.

The Estimated Number of Hours Annually below, as well as the Estimated Number of Units Annually below, are provided for evaluation purposes only and should not be considered as the actual hours and units required for these services.

All proposed firm, all-inclusive hourly rates, as well as firm, all-inclusive unit rates will be multiplied by their corresponding estimated annual volumes. These calculated totals, for all tables herein will then be summed together to establish the Bidder’s TOTAL EVALUATION PRICE to be used in the bid evaluation as outlined in Part 4 Evaluation and Selection.

Table 1: Guards at Posts and Escort Guards (REGULAR BUSINESS DAYS)

Resource Category	REGULAR RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	21,850	\$_____	61,500	\$_____	46,500	\$_____	46,300	\$_____	32,600	\$_____	40,600
Guard (Supervisor)	\$_____	3,350	\$_____	6,600	\$_____	2,800	\$_____	6,100	\$_____	3,300	\$_____	9,300
Resource Category	OVERTIME RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive	Estimated Annual Volume	Firm All-Inclusive	Estimated Annual Volume	Firm All-Inclusive	Estimated Annual Volume	Firm All-Inclusive	Estimated Annual Volume	Firm All-Inclusive	Estimated Annual Volume	Firm All-Inclusive	Estimated Annual Volume



	Hourly Rate		Hourly Rate		Hourly Rate		Hourly Rate		Hourly Rate		Hourly Rate	
Guard (Unranked)	\$_____	430	\$_____	1,230	\$_____	930	\$_____	930	\$_____	650	\$_____	810
Guard (Supervisor)	\$_____	70	\$_____	130	\$_____	60	\$_____	120	\$_____	70	\$_____	190

Table 2: Escort Guards Requested with Less Than 48 Hours Notice (REGULAR BUSINESS DAYS)

Resource Category	REGULAR RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	430	\$_____	1230	\$_____	930	\$_____	930	\$_____	650	\$_____	810
Guard (Supervisor)	\$_____	70	\$_____	130	\$_____	60	\$_____	120	\$_____	70	\$_____	190
Resource Category	OVERTIME RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	10	\$_____	25	\$_____	19	\$_____	19	\$_____	13	\$_____	17



Guard (Supervisor)	\$_____	2	\$_____	3	\$_____	2	\$_____	2	\$_____	2	\$_____	3
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Table 3: Guards at Posts and Escort Guards (WEEKENDS AND STATUTORY HOLIDAYS)

Resource Category	REGULAR RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	750	\$_____	7,850	\$_____	4,550	\$_____	8,350	\$_____	1,950	\$_____	600
Guard (Supervisor)	\$_____	2500	\$_____	1450	\$_____	1	\$_____	1	\$_____	3750	\$_____	1
Resource Category	OVERTIME RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	15	\$_____	160	\$_____	90	\$_____	170	\$_____	40	\$_____	10
Guard (Supervisor)	\$_____	50	\$_____	30	\$_____	1	\$_____	1	\$_____	75	\$_____	1



Table 4: Escort Guards Requested with Less Than 48 Hours Notice (WEEKENDS AND STATUTORY HOLIDAYS)

Resource Category	REGULAR RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	15	\$_____	160	\$_____	90	\$_____	170	\$_____	40	\$_____	10
Guard (Supervisor)	\$_____	50	\$_____	30	\$_____	1	\$_____	1	\$_____	75	\$_____	1
Resource Category	OVERTIME RATE											
	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume	Firm All-Inclusive Hourly Rate	Estimated Annual Volume
Guard (Unranked)	\$_____	1	\$_____	3	\$_____	2	\$_____	3	\$_____	1	\$_____	1
Guard (Supervisor)	\$_____	1	\$_____	1	\$_____	1	\$_____	1	\$_____	2	\$_____	1



Table 5: Alarm Response, Preventive Patrol, Lock/Unlock Door Rates (REGULAR BUSINESS DAYS, WEEKENDS AND STATUTORY HOLIDAYS)

Service Category	Atlantic		National Capital Region		Ontario		Pacific		Prairies		Quebec	
	Firm All-Inclusive Unit Rate	Estimated Annual Volume	Firm All-Inclusive Unit Rate	Estimated Annual Volume	Firm All-Inclusive Unit Rate	Estimated Annual Volume	Firm All-Inclusive Unit Rate	Estimated Annual Volume	Firm All-Inclusive Unit Rate	Estimated Annual Volume	Firm All-Inclusive Unit Rate	Estimated Annual Volume
Alarm Response	\$_____	60	\$_____	1400	\$_____	10	\$_____	1350	\$_____	15	\$_____	25
Preventive Patrol	\$_____	1	\$_____	500	\$_____	20	\$_____	1	\$_____	10	\$_____	40
Lock/Unlock Door	\$_____	520	\$_____	1	\$_____	1	\$_____	260	\$_____	1300	\$_____	1



Part 7 Model Contract

THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT

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

7.1 Revision of Departmental Name

Reference to the Minister of Public Works and Government Services or to Public Works and Government Services Canada contained in any term, condition or clause of the contract shall be interpreted as a reference to the Commissioner of Revenue or the Canada Revenue Agency, as the case may be, with the exception of the following clauses:

- a) Standard Clauses and Conditions; and
- b) Security Requirements.

7.2 Agency Restructuring

In cases where the Contracting Authority's department or agency is being reconfigured, absorbed by another government department or agency, or disbanded entirely, the Commissioner may, by giving notice to the Contractor, designate another Contracting Authority for all or part of the Contract.

7.3 Requirement

The Contractor must perform the Work in accordance with the Statement of Work (SOW) at Annex A, attached hereto and forming part of the Contract

7.3.1 Period of Contract

The period of the Contract is from April 1, 2020 to March 31, 2022 inclusive.

7.3.2 Requirement to implement CRA E-Procurement Solution

The Canada Revenue Agency's (CRA) intends to implement and use an e-procurement solution to expedite the ordering, receiving and reconciling goods and services under any resulting contract. This end-to-end e-procurement system is based on the Ariba suite of products and has been branded internally as "Synergy".

7.3.3 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four additional one-year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.



The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.3.4 Option to Purchase Additional Quantities of the Goods, Services or Both

The Contractor grants to Canada the irrevocable option to acquire the additional quantities of the goods, services or both described at Annex A SOW of the Contract under the same terms and conditions and at the prices and/or rates stated in the Contract.

The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment. The Contracting Authority may exercise an option at any time before the expiry of the Contract by sending a written notice to the Contractor.

7.4 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed **\$TBD** Customs duties are included and Applicable Taxes are extra.
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.

7.5 Standard Clauses and Conditions SACC A0000C (2012-07-16)

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual issued by Public Works and Government Services Canada (PWGSC).

The Manual is available on the PWGSC Website: <https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>



The following Clauses are incorporated by reference:

SACC Reference	Clause Title	Date
A2000C Or A2001C	Foreign Nationals (Canadian Contractor) Foreign Nationals (Foreign Contractor)	2006-06-16 2006-06-16
A3015C	Certifications	2014-06-26
A9065C	Identification Badge	2006-06-16
A9068C	Site Regulations	2010-01-11
A9113C	Handling of Personal Information	2014-11-27
A9117C	T1204 – Direct Request by Customer Department	2007-11-30
B9028C	Access to Facilities and Equipment	2007-05-25
C0711C	Time Verification	2008-05-12
C2000C	Taxes-Foreign-based Contractor	2007-11-30
C2605C	Canadian Customs Duties & Sales Tax –Foreign-based Contractor	2008-05-12
G1005C	Insurance	2008-05-12
H1001C	Multiple Payments	2008-05-12

7.6 General Conditions

2035 (2016-04-04) General Conditions – Higher Complexity - Services, apply to and form part of the Contract.

Section 01 titled “Interpretation” the definition of "Canada", "Crown", "Her Majesty" or "the Government" is hereby amended to read: "Canada", "Crown", "Her Majesty" or "the Government" means Her Majesty the Queen in right of Canada as represented by the Canada Revenue Agency (CRA).

Section 02 titled “Standard Clauses and Conditions” is hereby amended to delete the phrase “Pursuant to the Department of Public Works and Government Services Act, S.C. 1996, c. 16,” The remainder of Section 02 remains unchanged.

Section 16 titled “Payment Period” will not apply to payment made by credit cards.

Section 17 titled “Interest on Overdue Accounts” will not apply to payment made by credit cards.

Section 22 titled “Confidentiality”,

Subsection 5 is hereby amended to delete Public Works and Government Services (PWGSC) and insert Canada Revenue Agency (CRA).

Subsection 6 is hereby amended to delete “PWGSC Industrial Security Manual and its supplements”, and insert “Security Requirements for the Protection of Sensitive Information” issued by the CRA, Security and Internal Affairs Directorate (SIAD). The remainder of Section 22 remains unchanged.

Section 41 titled “Integrity Provisions- Contract” is hereby deleted in its entirety and replaced with:

The Supplier Integrity Directive (SID) incorporated by reference into the bid solicitation is incorporated into, and forms a binding part of the Contract. The Contractor must comply with the



provisions of the SID, which can be found on the Canada Revenue Agency's website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>

Section 45 titled "Code of Conduct for Procurement—Contract" is hereby deleted in its entirety.

7.7 Security Requirements – Canadian and non-Canadian Contractors

The following security requirement (SRCL and related clauses) applies and forms part of the Contract.

Personnel only – No Document Safeguarding Capability

1. The Contractor personnel requiring access to Protected information, assets or sensitive work site(s) must each hold a valid Reliability screening, granted by the Security and Internal Affairs Directorate (SIAD) of the Canada Revenue Agency (CRA) or granted/approved by the Canadian and International Industrial Security Directorate (CIISD) of Public Works and Government Services Canada (PWGSC).
2. The Contractor must not remove any Protected information or assets from the identified work site(s), and the Contractor must ensure that its personnel are made aware of and comply with this restriction.
3. Subcontracts which contain security requirements are not to be awarded without the prior written permission of CRA.
4. The Contractor must comply with the provisions of the:
 - Security Requirement Check List (SRCL), attached as Annex C of the contract; and
 - Security Requirements for Protection of Sensitive Information issued by CRA, Security and Internal Affairs Directorate.

These may be viewed at: [Security Requirements](#)

7.8 Authorities

7.8.1 Contracting Authority A1024C (2007-05-25)

The Contracting Authority for the Contract is:

Name: Charles Safarian

Telephone Number: (613) 867-4624

Fax Number: (613) 948-2459

E-mail address: charles.safarian@cra-arc.gc.ca

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



7.8.2 Project Authority A1022C (2007-05-25)

To be completed at the time of Contract award.

Name:

Address:

Telephone Number:

Fax Number:

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.

7.8.3 CRA Acquisition Service Desk

To be completed at the time of Contract award.

Name:

Address:

Telephone Number:

Fax Number:

E-mail Address:

The CRA Acquisition Service Desk provides national support to CRA Purchasers, the CRA Contracting Authority and the Contractor.

7.8.4 Contractor's Synergy Representative

Name:

Address:

Telephone Number:

Fax Number:

E-mail Address:

Contractor's representative for Synergy related questions

7.8.5 Contractor's Representative

To be completed at the time of Contract award.



Name:

Address:

Telephone Number:

Fax Number:

E-mail Address:

7.9 Contractor Identification Protocol

The Contractor must be responsible for ensuring that each of its employees, officers, directors, agents, and subcontractors (hereinafter referred to as “Contractor Representative”) complies with the following self-identification requirements:

A Contractor Representative who attends a Government of Canada meeting whether internal or external must identify themselves as being a representative of the Contractor prior to the commencement of the meeting to ensure that each meeting participant is aware of the fact that the individual is not a government employee;

During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and

If a Contractor Representative requires the use of the Government of Canada’s e-mail system in the performance of the Work, then the individual must clearly identify themselves as a non-government employee in all electronic mail in the signature block as well as under “Properties”.

This identification protocol must also be used in all other correspondence, communication and documentation.

7.10 Travel and Living Expenses

The CRA will not cover any travel and living expenses.

7.11 Delivery

Deliverables must be received by the Project Authority at the place and time specified herein.

7.12 Work Location

All work under this Contract will be performed at the CRA premises listed in Annex A Statement of Work.



7.13 Ordering Process

This requirement will be ordered via one or both the following methods and to be determined at the CRA's discretion at the time of order:

7.13.1 Task Authorization

The Contractor shall not commence any Work described in the Contract until the Contractor receives authorization from the CRA to proceed with the Work.

The CRA will authorize the Work with the Contractor, at the CRA's discretion, by submitting a Task Authorization either by:

- Submitting a Purchase Card Order (PCO) to the Contractor using the Synergy ordering system, as described at Annex A-10: Synergy Solution; or
- Submitting a Task Authorization form, signed by the Contracting Authority and sent to the Contractor via facsimile or email.

The CRA reserves the right to issue a cancellation of any Task Authorization within 48 hours of the issuance of the Task Authorization. Returns (other than returns for exchange in the case of rejected goods) will not be issued under the Contract.

7.13.2 Synergy Ordering Process

When the CRA has determined it will order the required goods or services via Synergy, orders, receipts and reconciliation of goods and services will be completed in accordance Annex A-10. The Contractor must be prepared to start receiving and delivering orders from the CRA by April 2020.

7.13.3 Invoicing Instructions

7.13.3.1 For orders submitted via a Task Authorization:

1. The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the General Conditions. Claims cannot be submitted until all work identified in the claim is completed. Each claim must be supported by a copy of the release document and any other documents as specified in the Contract;
2. Claims must be distributed as follows: The original and one (1) copy must be forwarded to the Technical Authority for certification and payment.

7.13.3.2 For orders submitted via Synergy:

A packing slip and/or invoice must be submitted on the Contractor's own form and must be included with the shipment and provide the following information:

1. Contractor's name and address;
2. GST registration number,
3. CRA Purchaser / Consignee's name and address;
4. Synergy PCO number;
5. date the goods were shipped or services delivered;
6. description of the goods and/or services;
7. Item or reference number;
8. cost (before tax);



9. amount charged to the acquisition card (exclusive of the Goods and Services Tax (GST) or Harmonized Sales Tax (HST), if applicable);
10. amount of GST or HST, if applicable, shown separately; and
11. total amount to be charged to the CRA.

7.14 Inspection and Acceptance

All deliverables under the Contract shall be subject to inspection and acceptance by the Project Authority at destination.

7.15 Synergy Non-Compliance

Failure to respect the delivery timelines as per the Contract or the problem resolution timelines set out under Annex A-10 paragraph 3.5 Support, Table 1: Technical Support Response Definitions will result in an escalation by the CRA Contracting Authority with the Contractor. In that event, the Contractor agrees to pay to the CRA, liquidated damages for each hour of delay, or any part thereof, for the time spent by the CRA addressing any issues that occur due to the failure of the Contractor to meet the CRA's Synergy requirements, based on the following calculation:

Hourly rate based on the current salary of a SP-06, Increment 4 and a 20% premium representing benefits. The annual salary for this occupation group is found at <http://www.cra-arc.gc.ca/crrs/wrknng/pyrts/sp-eng.html>.

The total amount of the liquidated damages must not exceed 10% of the Contract's value.

The CRA and the Contractor agree that the amount stated above is their best pre-estimate of the loss to the CRA in the event of such a failure, and that it is not intended to be, nor is it to be interpreted as a penalty.

The CRA will have the right to hold back, drawback, deduct or set off from and against the amounts of any monies owing at any time by CRA to the Contractor, any liquidated damages owing and unpaid under this section.

Nothing in this section must be interpreted as limiting the rights and remedies which CRA may otherwise have under the Contract.

7.16 Basis of Payment

See Annex B.

7.17 Payment Process

At Canada's discretion the Contractor will be paid using direct deposit, credit card or cheque. All communications regarding the specific method of payment, including changes thereto, will be in writing via email as it's not Canada's desire to formally amend the Contract if the payment method is changed.

At its sole discretion Canada may change the method of payment at any time during the period of the Contract, including any extension thereto, to one of the other two payment methods stated above.



It is the sole responsibility of the Contractor to ensure that their organization is entitled to receive payment from the Government of Canada.

7.17.1 Payment by Direct Deposit

The Contractor shall accept Direct Deposit for payment of the goods and/or services described herein. Payments by direct deposit will be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract.

To complete or amend a direct deposit registration, the Contractor must complete the Vendor Electronic Payment Registration form accessible at: <http://www.cra-arc.gc.ca/E/pbg/tf/rc231/rc231-14e.pdf>

It is the sole responsibility of the Contractor to ensure that the information and account number submitted to Canada via their Vendor Electronic Payment Registration form is up to date. Should the Contractor's information within the Vendor Electronic Payment Registration form not be accurate or up to date, the provisions identified herein under Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract will not apply, until the Contractor corrects the matter.

7.17.2 Payment by Credit Card

The Contractor shall accept Government of Canada Acquisition Cards (credit cards) for payment of the goods and/or services described herein. Payments by credit card will not be subject to Article 16 – Payment Period and Article 17 - Interest on Overdue Accounts, set out in 2035 General Conditions (2016-04-04) forming part of the Contract.

The CRA Acquisition Card is currently a MasterCard provided by Bank of Montreal. At any time during the period of the Contract, including any exercised option period(s), the CRA reserves the right to change its acquisition card type or provider.

7.17.3 Payment by Cheque

The Contractor shall accept Government of Canada cheques for the payment of goods and/or services described herein.

7.18 Certifications

The continuous compliance with the certifications provided by the Contractor in its bid and the ongoing cooperation in providing associated information are conditions of the Contract.

Certifications are subject to verification by Canada during the entire period of the contract. If the Contractor does not comply with any certification, fails to provide the associated information, or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.



7.18.1 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC) - Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

7.19 Confidentiality Document

The Contractor, as a person engaged by or on behalf of Her Majesty the Queen in right of Canada must sign the certification appearing in Annex D stating that the Contractor has read Sections 239 and 241 of the Income Tax Act and Sections 295 and 328 of the Excise Tax Act and understands that the Contractor is subject to and agrees to comply with those provisions. The above referenced Sections of the Acts are available (<http://laws-lois.justice.gc.ca/eng/acts/l-3.3/> and <http://laws-lois.justice.gc.ca/eng/acts/e-15/>).

The Contractor will use the services of any persons it requires in order to carry out its responsibilities under the Contract. If the Contractor employs such persons or contracts for their services, the Contractor will also pay their remuneration and all related expenses. The Contractor will also engage such persons whose services are to be utilized, on behalf of Her Majesty the Queen in right of Canada, for the purposes of Sections 239 and 241 of the Income Tax Act and Sections 295 and 328 of the Excise Tax Act. Each person so engaged will be required by the Contractor, as a pre-condition to assisting the Contractor in carrying out its responsibilities under the Contract, to sign the certification appearing in Annex D attached hereto, stating that they have read the provisions of Sections 239 and 241 of the Income Tax Act and Sections 295 and 328 of the Excise Tax Act and understands that they are subject to such provisions.

The Contractor must provide copies of all executed acknowledgement documents to the Contracting Authority designated herein prior to any work commencing under the Contract.

7.20 Joint Venture (NOTE to bidders: to be deleted at contract award if not applicable)

If the Contract is awarded to a joint venture, all members of the joint venture will be jointly and severally or solidarily liable for the performance of the Contract.

In the case of a contractual joint venture, no dispute, claim or action for damages, whether based in contract, or in tort, or any other theory of law, howsoever arising from the Request for Proposal, Contract, or any other related or subsequently issued documents including without limitation Task Authorizations, Contract Amendments, may be commenced, or brought against the CRA, including without limitation any of its officers, employees or agents unless each member of the joint venture is a party to such dispute, claim, or action (as the case may be).

The Contractor shall obtain the prior written approval of the Contracting Authority to any change in the membership of a contractual joint venture after Contract Award. Any change in the membership of a contractual joint venture after Contract Award without the prior written approval of the Contracting Authority shall be deemed to be default under the Contract.



The joint venture represents and warrants that it has appointed and granted full authority to (name to be inserted at Contract Award), the "Lead Member", to act on behalf of all members as its representative for the purposes of executing documentation relating to the Contract, including but not limited to Contract Amendments and Task Authorizations.

In the event of a contractual joint venture, all payments due and owing to the joint venture shall be made by the Canada Revenue Agency to the Lead Member of the joint venture. Any such payment to the Lead Member of the joint venture shall be deemed to be payment to the joint venture and shall act as a release from all the members of the joint venture.

By giving notice to the Lead Member the Canada Revenue Agency will be deemed to have given notice to all the members of the joint venture.

7.21 Proactive Disclosure of Contracts with Former Public Servants CRA Mod A3025C 2013-03-21

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.

7.22 Applicable Laws SACC A9070C (2014-06-26)

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

7.23 Priority of Documents SACC A9140C (2007-05-25)

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.

1. the Articles of Agreement;
2. 2035 (2016-04-04) General Conditions – Higher Complexity - Services;
3. Annex A: Statement of Work;
4. Annex B: Basis of Payment;
5. Annex C: Security Requirements Check List;
6. Annex D: Confidentiality Certifications
7. Annex E: Insurance Requirement
8. The Contractor's proposal dated (insert date of bid), as amended on (insert date(s) of amendment(s), if applicable).

7.24 Training and Familiarization of Contractor Personnel

7.24.1 Training of Contractor Personnel

Any training required by a new or replacement resource will be the responsibility of the Contractor, including training the resource for newly implemented software. The Contractor will assume all associated costs, including training pertaining to familiarization during the start-up of the Contract and Contract period for staff replacements. Training of the resource during the start-up period must



take place without a reduction in service level. Time spent on such training will not be billed to, nor paid by, CRA.

7.24.2 Familiarization Period

Prior to the completion of the Contract, it may be necessary for another resource to undertake a period of familiarization and training before the completion date. The Contractor will be required to familiarize the incoming resource according to the process described above or through the use of another approach negotiated with and acceptable to CRA.

7.25 Alternative Dispute Resolution

NEGOTIATION FOLLOWED BY MANDATORY MEDIATION, THEN, IF NECESSARY BY ARBITRATION OR LITIGATION

The parties agree to meet, negotiate in good faith, and attempt to resolve, amicably, any dispute arising out of or related to the contract or any breach thereof.

If the parties are unable to resolve the dispute through negotiations within 10 working days, the parties agree to attempt to resolve the dispute through mediation by submitting the dispute to a sole mediator selected jointly by the parties. All costs shall be shared equally between the disputing parties.

If a dispute cannot be settled with a 15 calendar day period after the mediator has been appointed, or if the parties are unable to select a mediator within 15 calendar days of the date of provision of notice by one party to the other of the intention to proceed to mediation, or such longer period as agreed to by the parties, the parties shall have the right to resort to any remedies permitted by law, including but not limited to arbitration or litigation.

All defences based on the passage of time shall be tolled pending the termination of the mediation.

7.25.1 Office of the Procurement Ombudsman (OPO)

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (l) of the Department of Public Works and Government Services Act will, on request and consent of the parties, participate in these meetings to resolve any such dispute, and subject to their consent to bear the cost of such process, provide to the parties a proposal for an alternative dispute resolution process to resolve their dispute. The Office of the Procurement Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail [at boa.opo@boa.opo.gc.ca](mailto:boa.opo@boa.opo.gc.ca).

7.25.2 Contract Administration

The parties understand that the Procurement Ombudsman appointed pursuant to Subsection 22.1 (l) of the Department of Public Works and Government Services Act will review a complaint filed by **[the supplier or the contractor or the name the entity awarded the contract]** respecting administration of the contract if the requirements of Subsection 22.2(1) of the Department of Public Works and Government Services Act and Sections 15 and 16 of the Procurement Ombudsman Regulations have been met, and the interpretation and application of the terms and conditions and the scope of the work of the contract are not in dispute. The Office of the Procurement



Ombudsman may be contacted by telephone at 1-866-734-5169 or by e-mail at boa.opo@boa.opo.gc.ca.

7.26 Legislative Changes

The CRA may review the terms and conditions of the contract, and subsequently may amend the contract should unexpected or unforeseen federal or provincial legislative changes come into effect, which may severely impact the Contractor's ability to successfully continue delivering the contracted services to the Agency. An example of such a change includes, but may not be limited to, a drastic change to a provincial minimum hourly wage.

7.27 Suitability of Services

All services rendered may be reviewed within a reasonable time from commencement of the Contract on the basis of quality and adherence to the customer's schedule and standards. Personnel assigned must be capable of performing the Contract at a level of competence deemed acceptable by the CRA.

Should personnel be found unsuitable to perform the services, and upon written advice from the CRA Contracting Authority, the Contractor shall implement suitable corrective action within five business days after written notice by the Contracting Authority. Any replacement(s) proposed must achieve a total weighted candidate score equal or superior to the resource being replaced. Any cost associated with such replacement shall be to the Contractor's own account.

7.28 Credit for Non-Performance - Escort Guards Late or Absent

7.28.1 In the event that a confirmed escort guard is late, or does not report to a previously confirmed assignment, the Contractor will be liable for all expenses incurred by the CRA that are attributable to this default. Expenses will include, but may not be limited to:

- a) Costs charged by a third party contractor who was to be escorted by a confirmed escort guard. If the third party contractor charges for time spent waiting for the late or absent escort guard or charges a cancellation fee, these expenses will be passed on to the Contractor and must appear as a credit on the following invoice to the CRA client.
- b) Amount equivalent to the cost that would have been payable to the Contractor had the confirmed escort guard report as scheduled. This will apply if the CRA was able to use its own staff to escort the third party contractor in lieu of the absent, confirmed escort guard. To clarify, if the CRA required 8 hours of escort guard services, payable at



\$20/hour, the Contractor will be liable to credit the CRA an amount of \$160 (8 hours x \$20/hour) on the following invoice to the CRA client.

- 7.28.2** Given a repetition of the situation described in subsection 7.28.1, the CRA reserves the right to pursue termination in whole or in part of this contract in accordance with 2035 (2016-04-04) General Conditions – Higher Complexity - Section 29 Default by the Contractor.
- 7.28.3** Instances of late or absent guards will be reported to the Contractor Representative by the Project Authority

7.29 Insurance – Specific Requirements

The Contractor must comply with the insurance requirements specified in Annex E . 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.



Annexes

The following Annexes apply to and form part of the Contract:

ANNEX A: STATEMENT OF WORK

ANNEX B: BASIS OF PAYMENT

ANNEX C: SECURITY REQUIREMENTS CHECK LIST (SRCL)

ANNEX D: CONFIDENTIALITY CERTIFICATIONS

ANNEX E: INSURANCE REQUIREMENT



ANNEX A - Statement of Work

1.0 TITLE: National Security Guard Services

2.0 OBJECTIVE

The Canada Revenue Agency (CRA) requires the service of a licensed security guard provider to provide licensed, trained, uniformed, qualified security guards of various ranks (as identified in Annex A-1), as well as the provision of equipment to ensure fulfillment of service commitments and requirements identified herein on a national level (currently 88 sites across Canada).

3.0 BACKGROUND

The Security and Internal Affairs Directorate (SIAD) of the Finance and Administration Branch is responsible for establishing safeguards and programs to ensure the protection of Agency employees, information, assets and buildings. The CRA currently occupies a total of 88 sites across Canada. Many of these sites are multi-tenant buildings where Public Services and Procurement Canada (PSPC) is responsible for providing some, but not all, security services identified herein.

4.0 DEFINITIONS AND ACRONYM

List of Acronyms:

AMSP – Alarm Monitoring Service Provider
PSMD – Physical Security and Program Management Division
ARG – Alarm Response Guard
CRA – Canada Revenue Agency
GR – Guard Report (see template at Annex A-9)
LSO – Local Security Official
PSPC – Public Services and Procurement Canada
SIAD – Security and Internal Affairs Directorate
SMC – Security Monitoring Centre

The following definitions apply to this requirement:

Local Security Official (LSO)

The LSO is a CRA security employee who is responsible for providing direction to the security guards. They will order escort services when required, and may be the contact for any after hour issues at the CRA site.

Business Hours:

Monday to Friday from 7:00 AM to 6:00 PM (**Local Time**),

Silent Hours:

Monday to Friday from 6:00 PM to 7:00 AM (**Local Time**), Weekends and Holidays.

On-Call Centre:

A third party Contractor responsible for responding to all calls made on the CRA-HQ emergency telephone lines during silent hours (for building status and emergency reporting) and to transfer these calls to the proper contacts.

The On-Call Centre receives the various calls and automatically forwards any calls from an external AMSP/SMC directly to the Contractor's dispatching unit, which will proceed with their alarm response procedures.



False Alarm:

Alarm caused by either a communications failure or by CRA employees who enter an incorrect security code, do not use an access card properly or use a key without their access card.

Live Situation:

Any occurrence deemed out of the ordinary and not identified as a false alarm, such as but not limited to: fire, theft, break-in, demonstrations, and hostage taking

Alarm Monitoring Service Provider:

A third party Contractor which monitors alarms at CRA locations. Alarm notification will be provided to the contact information provided by the Regional Assistant Directors of Security.

Security Monitoring Centre:

An alarm monitoring Centre that monitors alarms at CRA locations that is operated by the CRA. It is manned 24/7, 365 days a year. The Centres are equipped with Kantech and Chubb AFx technology. Currently set-up and operational at the following CRA sites:

- a) 9755 King George Boulevard, Surrey, BC
- b) 1050 Notre Dame Street, Sudbury, ON'

The CRA regions:

Pacific: The province of British Columbia

Prairies: The provinces of Alberta, Saskatchewan and Manitoba

Ontario: The province of Ontario, except the region covered by the National Capital Region

Quebec: The province of Quebec, except the region covered by the National Capital Region

Atlantic: The provinces of New Brunswick, Nova Scotia, Prince Edward Island and the Newfoundland and Labrador.

National Capital Region(NCR): The NCR's geographic territory encompasses the city of Ottawa along with one site across the river in Gatineau. It should be noted that NCR territory overlaps that of the Ontario Region who also have two tax processing operations in addition to the local Ottawa Tax Services Office in the same city limits.

5.0 TASKS

5.1 Supervisor Duties

The general duties assigned to the Contractor's Supervisors are stated below. Duties in addition to those listed will form part of the applicable Post Orders. As such, the Contractor's Supervisors' responsibilities include, but are not limited to:

- Assigning security guards to their required assignment or Post.
- Supervising all security guards on duty.
- Ensuring incident reports are completed and forwarded to the LSO and additional personnel as defined within the post orders within 24 hours of an occurrence.
- Ensuring all security guards comply with Post Orders and operational procedures, policies and procedures.
- Ensuring all security guards are up to date with any new issues or situations (provided by the LSO) by debriefing them and handing out procedures or instructions 15 minutes before each shift, as required.
- Ensuring the completion of all forms, reports and paperwork required by the LSO, in accordance with the Post Orders and operational procedures.
- Ensuring initial and ongoing on-site training of new security guards.



- Ensuring that all staff understand and follow the Fire and Evacuation Plan, and that all safety measures are implemented (alarm panels, fire alarms, emergency doors, cameras, etc.).
- Providing continual reviews with staff on Post Orders and operational procedures.
- Being the main point of contact for security guards on duty in providing issue resolution.
- Managing emergency situations until the arrival of the LSO.
- Performing and applying corrective action immediately when there is a deficiency or obvious performance issue with a security guard.

5.2 Guards at Posts

The Contractor must:

- Provide security guards that occupy posts at building entrances as per specified post schedules (see Annex A-6 for a sample of a Post Schedule).
- Ensure that security guards carry out the work entailed in the Post Orders assigned to each site (see Annex A-8 for a sample of a Post Order).
- Provide two ranks of security guards as requested – guard (unranked) and supervisor (see Annex A-1 for required experience).
- Ensure security guards scheduled to work during business and silent hours are able to read and comprehend Post Orders in the language(s) identified for each site (see Annex A-5 Building locations).
- Ensure bilingual security guards are scheduled to work during business and silent hours at sites identified as bilingual (see Annex A-5)
- Schedule the same guards at the same post, to ensure that Post Orders are being followed by security guards familiar with them.
- Provide properly trained back-up support for illness, holidays or other absences.
 - When back-up support is required and where there is another guard at the post, have a back-up guard available within two hours.
 - When back-up support is required and where there are no other guards at the post (in other words, a guard manning the post is about to book off, without another guard there to take over), have a back-up guard available within one half (½) hour. During the one half (½) hour when back-up support is on route, the post will be manned by a CRA Security employee, if one is available. When no CRA employee is available, the guard at post who was to book off must remain at the post until a back up guard reports.
 - Back-up support may initially be provided by a preventive patrol guard pending the arrival of a properly trained and qualified post guard. Under no circumstances should the preventive patrol guard leave the post while awaiting a properly trained and qualified replacement post guard.
- Protect CRA employees, assets, buildings and information, as outlined in the Post Orders at each site.
- Ensure that access control procedures are followed as outlined in the Post Orders at each site.
- As per the Post Orders, limit access by challenging any person trying to enter the building or found in the building not displaying a valid CRA identification card.
- Ensure security guards acknowledge security alarms at their assigned site, and respond to them according to instructions in the Post Orders, during business and silent hours.
- Have its representative or a designate, visit the sites with guards at posts (as identified at Annex A-5) to review elements such as, but not limited to security guards' performance, appearance and alertness. Each site must be visited a minimum of once per month, at random times during either business or silent hours to ensure:
 - a) A predictable pattern does not develop – guards should not expect the representative's visits;
 - b) Equal coverage and review of all shifts.
- The representative or designate who performed the site visit must record their visits and any deficiencies in the Guard Report at each post.



- A summary of the visit must be sent to the LSO identifying the date, who conducted the visit and identify any issue(s) found and how the issue(s) will be resolved.

Constraints for Guards at Posts

The Contractor must ensure that security guards at posts respect the following restrictions:

- Televisions, radios and digital music devices, used for personal reasons are not permitted.
- The use of personal cell phones for non-security/non-emergency related matters are not permitted.
- Hand-carried bags of all types (purses, back packs, etc.) are kept out of the sight of the general public.
- Only work-related reading material is allowed. Newspapers, magazines, school books, etc., are not permitted.
- No eating on post, unless the post orders specify otherwise.
- CRA staff will not be responsible to cover meals and breaks.
- Family members, friends or any other unauthorized person are not allowed access to the sites.

5.3 Escort Guards

The LSO will electronically (by e-mail) notify the Contractor a minimum of 48 hours before an escort guard is required. The Contractor must confirm in writing to the LSO that an escort guard is available and will report to the requested site at the requested time. This confirmation must be sent by e-mail at least 24 hours prior to the requested escort time.

Although all efforts will be made to provide a minimum of 48 hours notice, there may be instances where an escort guard is required on notice as short as four hours in certain emergency situations (example after hours unforeseen maintenance or repair). In those situations where less than 48 hours notice is provided by the CRA, and the Contractor successfully schedules the requested guard(s) (guard shows up and works the full shift requested), the CRA will pay the Contractor the hourly rate for a request made with less than 48 hours notice.

Although all efforts will be made to provide a minimum of 24 hours notice when the CRA must cancel a requested and confirmed guard, there may be instances where such notices are provided with less time. If a request for a confirmed escort guard is cancelled by the CRA less than 24 hours prior to the scheduled escort date and time, the CRA will reimburse the Contractor the equivalent of four hours at the hourly escort guard rate.

Third party contractors within this section are those that require escorting at all times in order to fulfil the requirements of their contract (example: after hours cleaning).

The Contractor must:

- Provide security guards to escort assigned third party contractors during both business and silent hours. Only one rank of security guards will be used as escort guards – guard (unranked).
- For bilingual sites, all efforts should be made by the Contractor to provide a bilingual escort guard; however should a bilingual escort guard not be available; the provided guard must have access by telephone to a bilingual representative of the Contractor.

The Contractor's Escort Guard must:

- Obtain briefing from the LSO or the guard at post regarding what floors the assigned third party contractors have been granted access to and if access keys are required to conduct the escort. Briefing will usually be in the form of an instruction sheet.



- Book on duty with the dispatcher and start a Guard Report where the guard will enter what was observed during the course of the escort.
- Escort the assigned third party contractors at all times. If for any reason, one or more of the third party contractors must leave the site, the escort guard must ensure that all third party contractors working in the area also leave until such time as the escort guard is able to return to the area.
- Not use any personal electronic device during their shift.
- Ensure that the third party contractors escorted do not read any documents not included in the briefing, smoke, or eat during the escort. Anyone reading, smoking or eating are to be told to cease. If they do not cease, the escort guard must contact the LSO to inform them of the situation.
- Ensure the escorted third party contractors do not separate; the escort guard is to tell them that they must stay together at all times. If they refuse to stay together, the escort guard is to call the LSO and inform them of the situation.
- Challenge the third party contractors' actions, if the escort guard sees anything being touched, cut or removed that should not be as defined in the briefing.
- Contact the LSO should any situation not identified in the briefing arise that requires information on how to resolve the problem.
- Once the third party contractors complete their work and have left the site, the escort guard must email the Guard Report to the LSO by 8:00 AM local time the following calendar day.
- CRA staff will not be responsible to cover meals and breaks.

5.4 Alarm Response Guards

The Contractor must provide security guards who respond to alarms as they occur.

For bilingual sites, all efforts should be made by the Contractor to provide a bilingual alarm response guard; however should a bilingual alarm response guard not be available, the provided guard must have access by telephone to a bilingual representative of the Contractor.

The following procedures must be followed by the alarm response guard in the event of an alarm:

The "On Call Centre" or AMSP – Alarm Monitoring Service Provider or SMC-Security Monitoring Centre will contact the Contractor's dispatch to inform it of the alarm. An Alarm Response Guard (ARG) will then be contacted by the dispatcher and sent to the site where the alarm occurred.

1. The ARG must call the "On Call Centre" or AMSP or SMC within 10 minutes of receiving the dispatch call to confirm their dispatch.
2. If the alarm occurred at one of the sites with a guard at post at a location identified in Annex A-5, the ARG must first attempt to contact the guard(s) at post at that location prior to proceeding to the site of the alarm.
3. If the guard(s) at post is reached, they will advise if the ARG should proceed to the site or if they themselves will respond to the alarm in accordance with the post order.
4. If the guard(s) at post cannot be reached, the ARG must proceed to the site.
5. The ARG must be on site within 30 minutes of receiving the dispatch call, unless otherwise informed by the guard at post, if applicable.



6. Once on site the ARG must verify the type of alarm - whether it is a false alarm or a live situation.
 - a) If it is a false alarm, the ARG must inform the AMSP or the SMC immediately by telephone.
 - b) If it is a live situation, the ARG must immediately contact the LSO by telephone.
 - i. Based on the information provided by the ARG by telephone, the LSO will evaluate the situation and advise the ARG accordingly.
 - ii. The ARG must patrol the outside perimeter of CRA premises to ensure that the premises are fully secured. Only when authorized by the LSO, can the ARG leave the premises.
7. The ARG must prepare a Guard Report, which must be e-mailed to the LSO by 8:00 AM, local time, the following calendar day.

5.5 Preventive Patrol Guards

The Contractor must:

- Provide security guards that perform security preventive patrols in accordance with specific CRA requirements and a pre-determined monthly schedule provided on a monthly basis by the Designated Local Security Officer of each region.
- For bilingual sites, all efforts should be made by the Contractor to provide a bilingual preventive patrol guard; however should a bilingual preventive patrol guard not be available, the provided guard must have access by telephone to a bilingual representative of the Contractor.

The Contractor's Preventive Patrol Guard must:

- Arrive on site and identify themselves as the preventive patrol guard to the guard at post, as applicable
- Check all floors inside and all areas outside the building, including but not limited to parking and loading docks.
- Identify potential security risks and requirements inside the location as well as the outside premises, such as but not limited to doors left ajar, doors not closing completely, unrecognizable smells, unrecognizable sounds.
- Perform a thorough review of CRA facilities' security posture - observe and provide recommendations on how to reduce and prevent risks and threats, as requested.
- Immediately notify the LSO of any security incidents, technical issues, compromises that affect the site.
- If the preventive patrol guard triggers an alarm, the patrol guard must call the AMSP/SMC, identifying themselves as the patrol guard, to inform the AMSP/SMC that they caused the alarm while entering/leaving the premises.
- Check with the guard at post, where applicable, before leaving the premises to confirm that the patrol is completed and they are leaving.
- Complete a Guard Report immediately after the patrol, outlining actions taken, corrective action(s) recommended, security incident(s) (as required) and alarm responses (if an alarm is triggered during the patrol). This report must be emailed to the LSO by 8:00 AM local time, the following calendar day.

5.6 Security Monitoring Centre (SMC)

Duties of the Contractor's guards manning the SMC include, but are not limited to:

- Provide continuous security observation through the assistance of surveillance cameras, access card systems and intrusion alarm systems;
- Action all incidents as they occur;



- Dispatch an ARG or notify the LSO when required;
- Provide daily reports in MS Office compatible format(s) which show the alarms times, type of alarms and actions taken;
- Provide all services in both English and French.

5.7 Lock/ Unlock Perimeter Door(s)

The Contactor will be provided with keys, alarm codes and access cards by the LSO, who verify these on a monthly basis.

Guards performing the lock/unlock perimeter door(s) service must:

- Arrive at the requested site at a time determined by the LSO and arm/disarm the alarm system and lock/unlock the perimeter door(s) as per direction provided by the LSO;
- Inspect the perimeter of the site before leaving and report anything unusual immediately to the contact provided by the LSO;
- Inspect the interior of the building, if required by the LSO.

6.0 MINIMUM SHIFT REQUIREMENTS

The minimum shift requirement for security guard services is three hours. Should the CRA request security guard services for a shift of less than three hours, the CRA will be liable to pay to the Contractor the amount equivalent to three hours of service. Should the CRA request security guard services for more than three hours, but the Contractor schedules its guards to work shifts of less than three hours each, the CRA will pay only for the amount of hours that the CRA requested. For example: if the CRA requested security guard services for four hours, but the Contractor schedules one guard for two hours and another guard for two hours, the CRA will pay only for the requested four hours of service. Minimum shift requirements do not apply to Alarm Response Guards, Preventive Patrol Guards and Lock/Unlock Services.

7.0 OFFICIAL LANGUAGES

The Contractor must ensure that communications and services of their guards are actively offered in English and French.

Active offer means:

Clearly indicate visually and verbally that members of the public can communicate with and obtain services from a designated office in either English or French. Mechanisms are in place to ensure that services are available in the official language chosen by the member of the public as per the Post Orders.

The availability of communications and services in both official languages can be promoted in a number of ways:

Prominently displaying the official languages symbol; Greeting members of the public in both official languages, beginning with the official language of the majority of the population of the province or territory where the office is located; For example, "Hello/Bonjour, Can I help you/puis-je vous aider" for all provinces outside of Quebec and "Bonjour/Hello, puis-je vous aider/can I help you" in the Province of Quebec.

Definition of Oral Bilingual Communications



Effective communications in both official languages means the ability to communicate orally, to clearly understand and be understood in both English and French.

The following is the acceptable level of second language ability for security guards to ensure effective communications for purposes of meeting the requirements of the contract.

The Contractor must:

- a) Ensure security guards can meet the following acceptable level of second language ability:
 - i. at this level of oral interaction, an individual can sustain a conversation on concrete topics relevant to the duties as specified in the call-up. He/she can give factual descriptions of actions taken, give straightforward instructions and directives to the public and visitors to the site, and give straightforward explanations; and
 - ii. at this level of oral interaction, an individual can handle most telephone and face to face conversations requesting concrete, routine information from members of the public or visitors to the site about services, publications, locations and number.

8.0 IDENTIFICATION

Each security guard shall carry in their possession an Identification Card prescribed under Provincial Regulations at all times when on duty and shall produce it for inspection at the request of any CRA Security personnel.

In the event that the prescribed Identification Card is lost, the Contractor must inform the LSO and obtain permission to allow the guard on site with a photocopy until such a time that a replacement licence has been obtained. The Contractor must inform the LSO how long a replacement licence will take.

At locations identified at Annex A-6, guards at posts will be required to carry government issued and controlled identification cards as well as access cards as necessary.

9.0 REPORTS

The Contractor must provide a monthly report in Microsoft Word, to the Contracting Authority, the Project Authority and the Regional Assistant Directors. The report must identify the following:

- Total hours of guard at post were provided.
- Total hours of escort guards provided, number of shifts not covered and the reason(s) for this.
- Number of alarm responses answered and the findings of the alarm (staff triggered alarm, key entry, etc.)

Notwithstanding any other reports referenced in this document, the Contractor is responsible for the following reports:

- 1) Guards at Post: Each guard must fill out a guard report and a copy must be emailed to the applicable LSO before 8:00 A.M. local time the following calendar day, ensuring clear and legible information is documented. Reports can be submitted in either of the official languages. Original copies of the Guard Report must be sent to the Project Authority with monthly invoices.
- 2) The Contractor must provide quarterly management reports that reflect up-to-date expenditures and number of security guards. Each report must include:
 - Total expenditure by region/location.
 - Number of security guards (including rank and type) by region/location.
 - Number of hours of security guards provided, by service type.



10.0 QUALIFICATION

A Canadian General Standards Board (CGSB) exists for suppliers of uniformed security guards and supervisors, which enables CRA and other organizations to recognize reliable security guard suppliers for the provision of security guard services. The Pre-Assignment Training Program outlined in Appendix "A" and Appendix "B" of the new National Standard of Canada for Security Guards and Security Guard Supervisors, CAN/CGSB-133.1-2017 must have been successfully completed by all security guards and guard supervisors prior to their assignment to this requirement.

All security guards must be qualified by the Saint John Ambulance, the Red Cross or other recognized First Aid training institution or qualified instructor as having successfully completed the Cardiopulmonary Resuscitation (CPR) Training and First Aid Training at the Emergency Level. First Aid Training certificates must be valid at all times while performing services under this requirement and guards must carry the certificates at all times while on duty.

11.0 SITE ORIENTATION

The Contractor shall ensure the satisfactory completion of the following on-the-job orientation by all security guards prior to assignment or reassignment to a post.

- i. Thorough knowledge and understanding of Post Orders including, but not limited to policy and specific orders for responding to:
 - Emergency alarms
 - Bomb threat
 - Suspicious package
- ii. Orientation and operation of security systems;
- iii. Orientation and operation of fire equipment;
- iv. Access control;
- v. Key control.

Whenever it becomes necessary to assign or reassign security guards to a post for the first time without the security guards having first completed the on-the-job orientation, the Contractor shall arrange at their own expense to have new guards "double bank" with experienced guards from the work site, prior to the security guard taking over the post on their own. The Contractor's representative or a designate, shall visit the post to ensure that new security guards are knowledgeable of their duties.

12.0 ISSUE RESOLUTION PROCESS

The Contractor must resolve issues within the following time standards and through the following methods, as a minimum.

Issues by Electronic Mail or Telephone:

The Contractor must provide to the LSO (who initiated the contact) confirmation of receipt of issues by e-mail within one hour of CRA sending an e-mail notifying the Contractor that an issue requires resolution. The Contractor must provide the LSO a proposed solution within four hours of receipt of the notification. The issue must be resolved within two business days of the date of CRA sending the original e-mail. Any increase in the resolution timeframe is at the discretion of the LSO and must be provided in writing.

If long distance calls are required to fulfill this service, the Contractor must provide a toll free number at no additional cost to CRA to be provided before Contract award.

13.0 HARRASSMENT/DISCRIMINATION



The CRA is committed to providing an environment that reflects its core values of integrity, professionalism, cooperation and respect. Harassment and/or discrimination by security guards directed towards employees or visitors to the CRA sites are NOT acceptable.

Harassment: Any form of misconduct or improper behaviour by a guard that is directed at and is offensive to an employee or a visitor and which that person knew or ought reasonably to have known would be unwelcome and cause offence or harm. It comprises objectionable conduct, comment or display that demeans, belittles or causes personal humiliation or embarrassment, and any act(s) of intimidation or threat(s), which detrimentally affects individual well-being or the work environment.

Discrimination: To differentiate adversely on one of the 11 prohibited grounds noted in the *Canadian Human Rights Act*, (i.e. race, national or ethnic origin, colour, religion, age, sex, sexual orientation, marital status, family status, disability or conviction for which a pardon has been granted).

Any allegation of harassment or discrimination will be addressed fairly and promptly. Any security guard against whom harassment allegations are made will be told to vacate the site immediately. Should such a situation arise, the Contractor will be contacted immediately and a qualified replacement guard must be supplied within two hours.

If, after further investigation, harassment or discrimination allegations against a guard are confirmed, the said security guard will no longer be permitted to work on any portion of this requirement.

14.0 CONTRACTOR REPRESENTATIVE - MEETINGS WITH THE CRA

The Contractor must employ a representative responsible for managing the conduct of the contract for each region. The Contractor's representative for each region must be available for in-person or remote meetings with the Project Authority or the Designated Local Security Officer, upon five business day's written notice at the Project Authority or the Designated Local Security Officer's location.

15.0 DISPATCHING

The Contractor must have dispatch equipment and must employ a dispatcher and ensure communication between their dispatcher and the security guards is available 24 hours per day. Contact information for each CRA building will be provided to the Contractor upon contract award.

16.0 INCREASE/DECREASES TO HOURS FOR GUARDS AT POSTS

The Local Security Officer will endeavor:

- a) To give the Contractor a minimum of two weeks advanced notice of any changes in hours of service on a long term basis.
- b) As much notice as possible for short term changes.

17.0 OVERTIME

The Contractor will be solely responsible to pay overtime rates to its employees for all overtime hours worked without the CRA's prior written approval, and will not bill and will not be paid at the overtime billable rate for any unapproved overtime hours.

Where unable to obtain direction from the CRA in a timely manner as to whether overtime is approved as billable overtime and such overtime is reasonably unavoidable in the circumstances, then the Contractor must promptly (same business day) provide the CRA with written details of the circumstances which required the working of overtime hours.



For posts where a guard is required for more than eight hours as per the guard schedule provided by the CRA, the onus is on the Contractor to manage its guard schedules to avoid any potential overtime payment. The CRA will not pay an overtime rate if the Contractor schedules any guard at post for more than eight hours.

The CRA will pay the Contractor the overtime rate for any time worked exceeding eight hours in the following circumstances ONLY and with CRA's written approval:

1. The CRA initially requested an escort guard for a period of eight hours or less, but during the shift it becomes evident that the CRA will require the guard(s) to stay beyond eight hours;
2. When guards at posts are scheduled by the Contractor as per the CRA's guard schedule, and on a given day, the CRA requests that a guard(s) continue to provide services beyond 8 hours each.

18.0 CLIENT SUPPORT

The Contractor will work in conjunction and close collaboration with the CRA LSO's in each region.

The LSO for each region will provide the following for each CRA site, as applicable:

- Control room communications equipment;
- Telephone necessary for the conduct of official business;
- Facilities for security guards' personal belongings;
- Post Orders, emergency orders, briefing (instruction sheet) etc.;
- LSO's information - as a contact person, available 24/7;
- CRA identification cards (where applicable);
- Current AMSP Contractor or SMC contact information;
- Current "On Call Centre" contact information;
- Guard Report template.

19.0 CONSTRAINTS

The Project Authority or the LSO for each Region will issue a report electronically to the Contractor identifying corrective measures taken by the CRA, where issues with guards were identified. The Contractor must in turn provide an action plan outlining how they propose to address such issues and what will be done to avoid such issues in the future. The action plan is to be submitted by email within five (5) working days of receipt of the report and is to be sent to the Project Authority and or the LSO for each Region.

20.0 DELIVERABLES

- Guard at Post services as defined herein in accordance with the schedule at Annex A-6;
- Escort Guards on an "as and when requested" basis;
- Security Monitoring Centre (SMC) guards;
- Alarm Response services as alarms occur;
- Preventive Patrol services in accordance with the schedule at Annex A-7;
- Lock/Unlock service on an "as and when requested" basis;
- Guard Report;
- Meetings as requested.;
- Action plan as required – see article 19.0 Constraints

21.0 INVOICING

- All invoices will be sent on a monthly basis to each LSO;
- Each invoice will include the guards name, site where work was performed, hours and the date the work was performed;



- The Contractor will issue invoices but will not input orders into Synergy for a period of 7 business days after issuing the invoices. This will give the CRA time to review the invoices;
- The CRA client will review the invoices and approve within 7 business days of receipt of the invoices;
- If a discrepancy is detected, the CRA will send an email notification to the Contractor;
- When reporting a discrepancy, the CRA will include the invoice number(s) that are under review and a detailed description of the discrepancy.



**ANNEX A-1
GUARDS AT POSTS RANK AND EXPERIENCE**

The following table outlines the ranks of guards at posts to be used for this requirement and the experience required.

RANK	EXPERIENCE
Guard (Unranked)	Acceptable without experience. Must be a licensed security guard.
Guard (Supervisor)	Acceptable with a minimum of one (1) year recent (within the last 3 years) direct experience in a security related field such as: a) Commercial security guard experience; and b) Security related experience with the Canadian Armed Forces, RCMP or Police Department. c) Must be a licensed security guard
Security Monitoring Centre Guard	a) Acceptable with a minimum of 6 months experience working in a monitoring room b) Must have experience with MS Office c) Must be a licensed security guard



ANNEX A-2 SECURITY PERSONNEL SELECTION STANDARDS

1. APPEARANCE:

The Contractor shall be responsible for ensuring the appearance of all security personnel assigned to this contract is such as to reflect credit on the Crown and the Contractor. Therefore, the following standards shall apply:

- a) Security guards shall be personally neat and clean.
- b) Approved uniforms are to be clean, pressed, properly fitting and in a state of good repair. Shoes are to be clean, polished and free of scuffmarks.
- c) Guards who normally shave daily shall present themselves with a clean shaved appearance while on duty.

2. LANGUAGE

Standards for Bilingual Ability: Guards employed in the NCR, Quebec and New Brunswick are required to be bilingual. The remaining requirements are identified in Appendix- A-7

Oral Interaction:

Effective communication in both official languages means the ability to give simple explanations; ability to give factual descriptions (of people, places or things); ability to narrate events (past, present, future); ability to handle work-related situations without complication.

Reading:

Ability to understand most descriptive work or factual material on work-related subjects; ability to grasp the main idea of most work-related texts, locate specific details and distinguish main from subsidiary ideas.

Government Non-Smoking Policy

The Contractor must ensure that all personnel adhere to the policy of the Government of Canada's that prohibits smoking on government premises.



ANNEX A-3 UNIFORM SPECIFICATIONS

1. GENERAL

All uniforms shall be provided by the Contractor and the prescribed uniforms shall be of the Contractor's regular design.

Uniforms shall be worn in the manner prescribed herein. The Contractor shall not issue dress instruction or uniform specifications, which deviate, or are in conflict with the uniform specifications contained herein.

Uniforms shall be worn by all security guards assigned to the requirement at all times while engaged in the performance of the services required. Security guards shall not be allowed at their workstation unless they are wearing an authorized uniform.

During the summer dress period, should the wearing of a jacket/blazer again become necessary, the tie shall be worn. Instances when this may become necessary include, but are not limited to change in weather and visits of high-ranking officials at any of the locations.

When T-shirts are worn as undergarments with open-collared, short-sleeved shirts and are visible at the neck, they shall be either white or the same colour as the uniform shirt being worn.

All guards shall wear, while on duty, a uniform conforming to the following requirements:

- Readily distinguished from public police force; and
- Displays the company logo or name in a prominent position.

It is agreed and understood that security guards shall be provided with uniforms in a satisfactory condition and subject to the acceptance of the Project Authority or the LSO for each region. Failure by the guards to wear acceptable uniforms may be considered grounds for the guard's removal from premises.

2. ACCOUTREMENTS

The uniform must include:

- a) Shoes black, laced, plain toe, dress uniform, free of visible monograms, and which are clearly not of the athletic shoe/boat variety. Supplied by guard.
- b) Belt - black or brown leather
- c) Socks/hose. Conservative in design and colour coordinated.



**ANNEX A-4
MATERIAL SPECIFICATIONS**

The following items are required in the performance of guard duties and must be provided by the Contractor.

The equipment listed below will remain the property of the Contractor who shall be responsible for all operating costs, including but not limited to:

- Uniforms,
- Flashlights and lanterns,
- Batteries and bulbs for flashlights and lanterns,
- Cellular telephone(s),
- Company patrol vehicle(s),
- Dispatch equipment,
- Maintenance equipment and back-up equipment for all of the above.



**ANNEX A-5
BUILDING LOCATIONS**

Canada Revenue Agency requires escort guards, alarm response service guards, preventative patrol service guards and lock/unlock door service guards at the following locations.

BUILDING LOCATIONS	GUARDS AT POSTS	ESCORT GUARDS	ALARM RESPONSE GUARDS	PREVENTIVE PATROL GUARDS	LOCK/UNLOCK DOORS	BILINGUAL SERVICES
PACIFIC						
9737 King George Boulevard, Surrey, BC		X	X			
1415 Vancouver Street, Victoria, BC		X	X			
280 Victoria Street, Prince George, BC		X	X		X	
401 Burrard Street, Vancouver, BC		X	X			
13450 102 nd Avenue, Surrey, BC		X	X			
277 Winnipeg Street, Penticton, BC		X	X			
187 Nanaimo Avenue, Penticton, BC		X	X			
200-471 Queensway, Kelowna, BC		X	X			
757 West Hastings Street, Vancouver, BC		X	X			
468 Terminal Avenue, Vancouver, BC		X	X			
1188 West Georgia Street, Vancouver, BC		X	X			
300 West Georgia Street, Vancouver, BC		X	X			
9755 King George Boulevard, Surrey, BC	X		X			X
PRAIRIE						
325 Broadway Street, Winnipeg, MB		X	X	X	X	
125 Fennell Street, Winnipeg, MB		X	X			
66 Stapon Road, Winnipeg, MB	X	X				
10423 101 Street North West, Edmonton, AB		X				
1955 Smith Street, Regina, SK		X			X	
9700 Jasper Avenue, Edmonton, AB		X			X	
220 – 4th Avenue South East, Calgary, AB		X				



200-419 7th Street South, Lethbridge, AB		X	X			
340-3rd Avenue North, Saskatoon, SK		X		X	X	
360 Main Street, Winnipeg, MB		X	X			
153 11th Street, Brandon, MB		X				
1601 Airport Road North East, Calgary, AB		X	X		X	
4996 49th Avenue, Red Deer, AB		X	X			
ONTARIO						
185 Ouellette Avenue, Windsor, ON		X				
11 Station Street, Belleville, ON		X				
1161 Crawford Drive, Peterborough, ON		X	X	X		
166 Frederick Street, Kitchener, ON		X				
180 Shirreff Street, North Bay, ON		X				
32 Church Street, St. Catharines, ON		X				
441 University Avenue, Windsor, ON		X				
50 Queen Street North, Kitchener, ON		X				
1 Front Street West, Toronto, ON		X				
1050 Notre Dame Street, Sudbury, ON	X	X	X	X		X
120 King Street, Hamilton, ON		X				
451 Talbot Street, London, ON		X				
5001 Yonge Street, Toronto, ON		X				
130 South Syndicate Avenue, Thunder Bay, ON		X				
55 Town Centre Court, Toronto, ON			X			
200 Town Centre Court, Toronto, ON			X	X		
933 Miwik Street, Toronto, ON			X			
1475 John Counter Boulevard, Kingston, ON			X			
NATIONAL CAPITAL REGION						
555 McKenzie Avenue, Ottawa, ON	X	X	X	X		X
25 Fitzgerald Road, Ottawa, ON		X	X			X



20 Fitzgerald Road, Ottawa, ON		X	X			X
21 Fitzgerald Road, Ottawa, ON		X	X			X
35 Fitzgerald Road, Ottawa, ON		X	X			X
250 Albert Street, Ottawa, ON		X	X			X
2465 St-Laurent Boulevard, Ottawa, ON		X	X			X
427 Laurier Avenue, Ottawa, ON		X	X			X
344 Slater Street, Ottawa, ON		X	X			X
320 Queen Street, Ottawa, ON		X	X			X
112 Kent Street, Ottawa, ON		X	X			X
750 Heron Road, Ottawa, ON		X	X			X
2323 Riverside Drive, Ottawa, ON		X	X			X
171 Slater Street, Ottawa, ON		X	X			X
2215 Gladwin Crescent, ON		X	X			X
2204 Walkley Road, Ottawa, ON	X	X	X			X
333 Laurier Street, Ottawa, ON		X	X			X
875 Heron Road, Ottawa, ON	X	X	X	X		X
2277 Riverside Drive, Ottawa, ON		X	X			X
395 Terminal Avenue, Ottawa, ON		X	X			X
QUEBEC						
4695 12e avenue, Shawinigan, QC		X				X
2251, boulevard René-Lévesque, Jonquière, QC	X	X	X			X
50 Place de la Cité, Sherbrooke, QC		X				X
2250 Saint-Oliver, Trois Rivières, QC		X				X
3250, boulevard Lapinière, Brossard, QC	X	X	X			X
3400, avenue Jean-Béraud, Laval, QC	X	X	X			X
305 boulevard René Lévesque Ouest, Montréal, QC		X		X		X
800, rue de la Gauchetière Ouest, Montréal, QC		X				X
105, rue McGill, Montreal, QC		X		X		X
2575, boulevard Sainte-Anne, Quebec, QC		X	X			X



100, rue La Fontaine, Chicoutimi, QC		X	X			X
180, avenue de la Cathédrale, Rimouski, QC		X	X			X
85, chemin de la Savane, Gatineau, QC		X				X
44, avenue du Lac, Rouyn-Noranda, QC		X				X
200, boulevard René Lévesque Ouest, Montréal, QC		X				X
ATLANTIC						
165 Duckworth Street, St.John's, NL	X	X	X			
290 Empire Avenue, St. John's, NL	X	X				
132 Glencoe Drive, Mount Pearl Drive, NL	X	X	X			
145 Hobson Lake Drive, Halifax, NS					X	
4-40 Alderney Drive, Dartmouth, NS					X	
65 Canterbury Street, Saint John, NB	X	X				X
217-770 Main Street, Moncton, NB		X				X
201 St. George Street, Bathurst, NB		X				X
555 McAllister Drive, Saint John, NB		X				X

All guards providing services in the NCR, Quebec and New Brunswick must be bilingual.



**ANNEX A-6
GUARDS AT POSTS SCHEDULE**

Canada Revenue Agency requires guards at post at the following location.

PACIFIC

Location	Guard Rank	Schedule
9737 King George, Surrey, B.C.		
Weekdays	Guard	05:00 - 12:00
	Guard	12:00 - 19:00
	Guard	06:00 -12:15
	Guard	12:15-18:30
	Guard	7:00 -11:00
	Supervisor	09:00 -17:00

**Monitoring Station Hours
PACIFIC**

Location	Guard	Schedule
9737 King George BLVD., Surrey, B.C.		
	Guard	05:30-13:30
	Guard	13:30-21:30
	Guard	14:00-22:00
	Guard	21:30-05:30
	Guard	22:00-06:00
	Supervisor	06:00-14:00

PRAIRIE

Location	Guard Rank	Schedule
66 Stapon Road, Winnipeg, MB		
Weekdays	Supervisor	05:30-13:30
	Guard	05:30-13:30
	Guard	06:00-14:00
	Guard	13:30-21:30
	Guard	14:00-22:00
	Guard	14:00-22:00
	Guard	22:00-06:00
	Guard	22:00-06:00
Saturdays	Guard	06:00-14:00
	Guard	06:00-14:00
	Guard	14:00-22:00
	Guard	14:00-22:00



	Guard	22:00-06:00
	Guard	22:00-06:00
Sunday and Statutory	Guard	06:00-14:00
Holidays	Guard	06:00-14:00
	Guard	22:00-06:00

ONTARIO

Location	Guard Rank	Schedule
1050 Notre Dame, Sudbury, ON		
Weekdays-Front Desk	Supervisor	06:00-14:00
	Guard	06:00-10:00
	Guard	14:00-00:00

Monitoring Station Hours

Location	Guard	Schedule
1050 Notre Dame, Sudbury ON		
Weekdays	Guard	08:00-20:00
	Guard	20:00-08:00

NATIONAL CAPITAL REGION

Location	Rank	Schedule
555 MacKenzie, Ottawa ON		
Monday	Supervisor	07:00-15:00
	Guard (SARC/2IC)	07:00-17:00
	Guard (Rover)	09:00-17:00
	Guard (Loading Dock)	07:00-16:00
	Guard (Post 1)	06:00-18:00
	Guard (Post 2)	06:00-14:00
	Guard(Post 1)	18:00-6:00
	Guard (Post 2)	14:00-22:00
Saturday / Sunday / Designated Holiday	Guard (Post 1)	06:00-18:00
	Guard (Post 2)	14:00-22:00
	Guard(Post 1)	15:00-23:00
ITSO 2204 Walkley, Ottawa ON		
Weekdays	Guard (Front Desk)	06:30-17:30



OTC 875 Heron Ottawa, ON		
Weekdays	Supervisor	06:00-14:00
Weekdays (24/7)	Guard (front desk) x2	06:15-14:15
	Guard (front desk) x2	14:15-22:15
	Guard (front desk)	22:15-0615

QUEBEC

Location	Guard Rank	Schedule
2251 boul. René-Lévesque, Jonquière, QC		
Weekdays	Supervisor	08:00-16 :00
	Guard	04:30-08:30
	Guard	14:00-18:00
	Guard	06:00-18:00
February to June	Guard	18:00-00:30

4695 12e Ave., Shawinigan, QC		
Weekdays	Supervisor	07:00-15:00
	Guard	05:00-13:00
	Guard	13:00-21:00
	Guard	06:30-10:30
Outaouais and Rouyn- Noranda Tax Services Office 3400 Jean-Béraud Ave. Laval		
Weekdays	Guard*	06:00-13:00
	Guard*	12:30-18:30
Montérégie-Rive-Sud Tax Services Office 3250 Lapinière Blvd. Brossard		
Weekdays	Guard	6:30-12:30
	Guard	11:30-18:30

***Secret Clearance is required for the Laval site.**



ATLANTIC

Location	Guard Rank	Schedule
290 Empire Ave., St. John's, NL		
Weekdays	Supervisor	07:30-16:30
	Guard	06:45- 15:45
	Guard	07:00-19:00
	Guard	19:00-07:00
Saturday, Sunday and Statuary holidays		
	Guard	07:00 -19:00
	Guard	19:00-07:00
132 Glencoe Dr, Mount Pearl, NL		
Weekdays	Guard	07:00-15:00

All guards providing services in the NCR, Quebec and New Brunswick must be bilingual.



**ANNEX A-7
PREVENTATIVE PATROL SCHEDULE
(EXAMPLE)**

Example of Schedule

Patrols Hours	Office#1	Office#2	Office#3	Office#4	Office#5	Office#6
0:00						
1:00						
2:00						
3:00						
4:00						
5:00						
6:00						
7:00						
8:00						
9:00						
10:00						
11:00						
12:00						
13:00						
14:00						
15:00						
16:00						
17:00						
18:00						
19:00						
20:00						
21:00						
22:00						
23:00						

A detailed listing will be supplied to the Contractor each month. The expected date of the patrol will be displayed in the appropriate location box for the appropriate time.



ANNEX A-8 CRA POST ORDER TEMPLATE

1. POST ORDERS

The Project Authority, LSO or an authorized designate will furnish the Post Orders to the Contractor. Post Orders will be in sufficient detail to permit the security guards to effectively carry out their duties.

The Contractor will perform all the work outlined in the Post Orders and in other instructions relating to security issued by the Project Authority, LSO or an authorized designate.

2. POST ORDER REVISION

Post Orders will be reviewed by the Project Authority, LSO or an authorized designate and updated (if necessary) at least once per month to ensure that security guards are not adhering to obsolete procedures. The original Post Order as well as all amendments will be dated. Security guards manning these posts must read and sign as having read the most recent version of the Post Orders.

The CRA reserves the right to amend, modify and/or re-issue Post Orders as required and the Contractor will respond accordingly to affect their implementation.

The Project Authority, LSO or an authorized designate will discuss with the Contractor any proposed changes to Post Orders to ensure that any revisions or new procedures do not contravene any collective bargaining rights the Contractor may have with its personnel.

Security guards are to be familiar with Post Orders as last amended.



CRA POST ORDERS TEMPLATE

Orders for guards are normally divided into three categories as follows:

i) PERMANENT POST ORDERS

These Post Orders are set out in a manual that itemizes the standard procedures and instructions for all guards irrespective of building or location, for the Agency. They also set out the department, dress and conduct required of all the guards employed.

ii) POST ORDERS

These are specific Post Orders that pertain to one post, and deal with routine duties and prescribed courses of action for the guard at that post.

iii) SPECIAL INSTRUCTIONS

There are special instructions for a specific event or Post Orders of a temporary nature. They should be issued in memorandum form and have a cancellation date if at all possible. These instructions will be kept up-to-date, and cancelled orders will either be destroyed or returned to the originator on cancellation date or when a special event is completed. These special instructions should be kept to a minimum.



Special Post Orders will be written with the following in mind:

- a) Each special Post Order should deal with only one subject. This will allow for each revision or cancellation when required and each subject can be easily located through a complete index.
- b) The special Post Order should be as brief and clear as possible.
- c) The special Post Order should be written in the simplest language possible. This is to say that it should be written in basic English/French that can be understood by a person with only secondary education. If three readers cannot agree on the clear meaning of a passage, sentence or instruction, then it is badly written for order purposes.
- d) Special Post Orders should be indexed in detail and cross-referenced where possible.
- e) A copy of all pertinent special Post Orders should be available at each guard post and kept up-to date and in good order. If there is more than one guard post in a building or agency, then there should be a complete set of Post Orders for all posts and one copy should be available for the Supervisor of the Guard Staff.
- f) The drafter or originator of the Post Orders should keep a master copy from which additions, deletions and amendments are made.
- g) Loose leaf folders or books allowing pages to be removed and replaced with amended pages, are recommended.

Post Orders Format

The layout for the Post Orders should be simple and be standardized for all Posts. The following are some of the standards that should be utilized:

- 1. Capitalize all headings in bold print and underline;
- 2. Use short, concise sentences;
- 3. Amend pages when required;
- 4. Change the listing of any phone numbers and reporting personnel immediately;
- 5. Have a complete index, preferably at the front of the orders.

The following is a sample layout for guidance only and headings can be added, deleted or changed depending on circumstances and requirements:



The first page should contain the following information:

POST ORDERS FOR
(NAME OF BUILDING)
(ADDRESS OF BUILDING)
COMPANY OR AGENCY

INDEX

A complete and concise index together with cross-references where required.

EMERGENCY TELEPHONE NUMBERS

These should include the following:

POLICE: having local authority

FIRE:

AMBULANCE:

HOSPITALS:

MAINTENANCE:

HEATING:

ELECTRICAL:

ALARM COMPANY:

ELEVATOR: Trouble

DEPARTMENTAL OR COMPANY REPRESENTATIVES

To be contacted in event of Emergency

(These numbers should be both office & home phone numbers)



1. INTRODUCTION

These special Post Orders should be read in conjunction with Permanent Orders and where there is a conflict "Post Orders" will take precedence.

The guard should familiarize himself/herself with all orders and instructions.

2. HOURS OF DUTY

This should give hours of duty for each guard at his post.

Example:

2400 - 0800	1 guard
0800 - 1600	1 guard
1600 - 2400	2 guards (guard number 2 to patrol and supervise cleaning staff while guard number 1 remains at his post).

Guard should report at least ten (10) minutes prior to commencement of shift for any instructions or information from outgoing guard. New guard should report for orientation at least one (1) hour prior to commencement of his/her shift.

3. LOCATION OF POST

This should give an exact location of the post and whether it is static post or roving (if roving - indicate what the tour is to entail).

4. DUTIES OF GUARD

This section should give the guard a brief description of the duties that are expected of him/her at his/her post, making only brief reference to patrols, etc., that are covered under separate heading.

5. REPORTING

If the guard has to report by phone at intervals, these should be laid out, with the telephone number to report to.

6. PATROLS

This section should give the times patrols are to be made, or if staggered, how many per shift, the route and the location of punch stations, if applicable.

There should also be a paragraph listing what the guard should look for while on patrol, and reporting procedures.

Provide an Appendix "A" for a floor layout plan of the building with location of key punches clearly marked by number if possible.

7. LOCKING AND UNLOCKING DOORS

This should include a complete list of doors and when they should be locked and when unlocked.

Provide an Appendix "B" listing all doors, and their location on the building plan.

8. KEYS



This should list the general instructions for the guard regarding keys at the post.

Provide an Appendix "C", Re: Keys and instructions for each key.

9. CLEANING STAFF

This part should give the hours the cleaning is done, the name of the cleaning company and a contact at the company including office and home telephone numbers, should there be a problem.

Also included under here should be any area where the cleaning staff are restricted to enter and if they have to be under escort.

10. BUILDING PASSES

PERMANENT PASS: should give a short description and if more than one, list the restrictions for each.

TEMPORARY PASS: give description and when applicable.

Provide an Appendix "D" for photo static copy, together with list and sample of authorized signatures for signing authorities.

11. ACCESS CONTROL

This will give instructions to the guard on who is to be allowed into the building and when. It should also include:

1. whether or not employees have to show passes;
2. when employees are required to sign in and out, if this is applicable;
3. description of the form to use for signing in both visitors and employees working after hours.

12. VISITORS

This should be a specific instruction of what procedure to follow regarding visitors, e.g. free entry, signing in, escorts, etc.

13. FIRE

List specific instructions of what the guard's duties are and who is to be contacted. This may include designated employees as well as Fire and Police Department.

14. BOMB THREAT OR THREATENING TELEPHONE CALLS

List instructions for guard as well as any pertinent material which can be included under Appendix "E", e.g. reporting forms, telephone instructions, etc.

15. INJURY TO PERSONNEL

List instructions for guard in event of injury to employees.

16. ELECTRICAL POWER FAILURE



Instructions on what to do in event of failure, including contacts, and if there is auxiliary power, any instructions on how to start it up.

17. HEAT LOSS OR OTHER EMERGENCIES

Instructions for guards and contacts.

18. LOST AND FOUND

Instructions to the guard for the disposition of lost and found articles.

19. REMOVAL OF MATERIAL, EQUIPMENT BY EMPLOYEES

This should give instructions to the guard who notices employees or other persons removing equipment or material from the building, and whether they require written authority.

20. REPORTS AND REPORTING PROCEDURES

This instruction should advise the guard when reports are to be submitted and a short description of the form. A copy of the report form should be included under Appendix "F".

21. TELEPHONES

This instruction should indicate to the guard how the phone should be answered e.g. "Good morning Department Security Desk". (if applicable)

When answering phones, promptly, clearly and concisely state the following:

1. Security;
2. Name of the Post;
3. Guard (surname), e.g., "Security, West Post, Guard your last name."

When contacting an individual from a call-out list please ensure that the person you are calling fully understands why you are calling and what you want/need them to do. When leaving messages on voice mail, please use the following format:

"Hello, this is Guard _____ calling. The time is _____ (24 hour clock) on _____ (date) and I am calling from the _____ (location). I am calling you because _____ (state nature of call). I will wait 10 minutes to hear back from you before I proceed to the next person on my contact list. Thank you."

22. PARKING

If there is parking in the premises instructions re illegal parking, parking permits, reserved spaces, etc.

23. ACCIDENTS

Instructions should be given in the event of an accident e.g. what service or authority to notify, telephone numbers, etc.

24. PRESS, RADIO, PHOTOGRAPHERS



In the event of the above having access to the premises, instructions should be given as to who to contact, etc.

25. NOTEBOOKS

26. PEDDLERS & CANVASSERS

Instruction re: above.

27. TELEGRAMS, NEWSPAPERS & MESSENGERS

Instructions should be given for both working hours and silent hours on the above.

28. DESIGNATED AUTHORITIES

In cases not covered in these orders, the guard should be instructed to obtain authorization from a designated authority. A telephone number should be provided.

APPENDICES (TO BE ATTACHED TO POST ORDERS)

“A” Plans of building with patrols and clock punch station locations.

“B” Plans of building with door locations marked.

“C” List of keys and specific instructions.

“D” Permanent and temporary passes and signing authorities.

“E” Bomb threats.

“F” Reporting Form.



ANNEX A-9 GUARD REPORT

INSTRUCTIONS FOR COMPLETING THE GUARD REPORT

- ❑ **Site Address:** Indicate the name of the building, street number, and street name of the location where you will be working during your shift.
- ❑ **Page:** Indicate the number of pages in your report (i.e. 1 of 1).
- ❑ **Date:** Indicate the date when your shift begins.
- ❑ **Guard name / number:** Write your full name and security guard licence number.
- ❑ **Shift:** Indicate the time when your shift begins and ends.
- ❑ **Reference number:** Indicate the reference number and a description anytime NSCC is contacted or an alarm sounded, etc.
- ❑ **Time/Details:** The first entry should be the start of your shift. Continue entering details of your shift such as the start/end of a patrol or the start/end of an alarm response. The last entry should be the end of your shift. An example of an unusual occurrence or incident would be finding damage to the property during a patrol, responding to an alarm, or a threat to security or the health and safety of employees.
- ❑ **Guard signature:** Remember to sign your Guard Report at the end of your shift. If an additional sheet was used for your report, sign both copies and staple them together.

Note: Once the form is completed, guards at posts must mail it to the Local Security Official (LSO) via internal mail. Escort Guards, Alarm Response Guards and Preventive Patrol Guards must email it to the local LSO by 8:00 A.M. Local time the following calendar day.

COMMENT REMPLIR LE RAPPORT DU GARDE DE SÉCURITÉ

- ❑ **Adresse du lieu de travail :** Indiquer le nom de l'immeuble, le numéro d'immeuble ainsi que le nom de la rue du lieu où sera effectué le quart de travail.
- ❑ **Page(s) :** Indiquer le nombre de pages que comporte le rapport (ex. : 1 de 1).
- ❑ **Date :** Indiquer la date du début du quart de travail.
- ❑ **Nom et numéro du garde de sécurité :** Incrire le nom au complet ainsi que le numéro de licence de garde de sécurité.
- ❑ **Quart de travail :** Indiquer l'heure du début et l'heure de la fin du quart de travail.
- ❑ **Numéro de référence :** Incrire le numéro de référence et une description lors de tous contact avec le CNAS ou lorsque qu'une alarme sonne, etc.
- ❑ **Heure/Détails :** La première entrée devrait être l'heure du début du quart de travail. Continuer en indiquant des détails relatifs au quart de travail telles l'heure du début et l'heure de la fin d'une patrouille ou l'heure du début et l'heure de la fin d'une alerte. La dernière entrée devrait être l'heure de la fin du quart de travail. La découverte en cours de patrouille de dommages causés à la propriété, le temps mis à répondre à une alerte ou une menace pour la sûreté ou pour la santé et la sécurité des employés constituent de bons exemples d'un événement inhabituel ou d'un incident.
- ❑ **Signature du garde de sécurité :** Ne jamais oublier de signer le rapport du garde de sécurité à la fin du quart de travail. Si un feuillet supplémentaire a été nécessaire pour l'établissement du rapport, signer les deux copies et les agraffer.

Nota : Lorsque le formulaire est rempli, le garde du poste doit l'envoyer par courrier à l'officier de sécurité désigné (OSD) via le courrier interne. Les gardes responsable pour les escortes, les gardes responsables pour répondre aux alarmes et les gardes effectuant les patrouilles préventives doivent envoyer leur rapport par télécopieur au OSD avant 08:00 AM HNE/HAE, le jour suivant.



ANNEX A-10 Synergy Solution

1. Overview

The Canada Revenue Agency’s (CRA) e-procurement solution for ordering, receiving and reconciling goods and services is an end-to-end e-procurement system based on the Ariba suite of products and has been branded internally as “Synergy”.

Synergy is the primary system the CRA uses to purchase goods and services with an acquisition card, using CRA-hosted catalogues.

The Ariba Supplier Network (ASN) is an e-business solution that connects buyers and Contractors across different systems and processes. The CRA and the Contractor will use the ASN to communicate order-related information, including, and without limitation:

Purchase card orders, change orders, and cancelled orders from the CRA to the Contractor; and Order confirmation and shipping notices from the Contractor to the CRA.

2. Glossary of Terms

Advance ship notice	An advance ship notice is a document that the Contractor transmits using the Ariba Supplier Network to Synergy, stating that the Contractor is shipping one or more items from a Synergy purchase order.
Ariba	Ariba is the name of a suite of spend management software. The term “Ariba” is often used to refer to the software or the system running their software.
Ariba Supplier Network	Ariba Supplier Network (ASN) is the network used to communicate between users of the Ariba software and the Contractors.
ASN	See Ariba Supplier Network.
Comma Separated Value	A comma separated value (CSV) format for exchanging data files between spreadsheet software.
Contracting Authority	The Contracting Authority (CA) is identified under the “Authorities” article of the Contract (see sub-article titled “ <u>Contracting Authority</u> ”)
CA	See Contracting Authority
CSV	See Comma Separated Value
JPEG	A format for compressing electronic image files.
Purchase Card Order	A purchase card order (PCO) is the transaction generated by Synergy against any given catalogue.
PCO	See Purchase Card Order
Synergy	Synergy is the Canada Revenue Agency’s branded implementation of the Ariba software suite. (See “Ariba” above).
UNSPSC	United Nations Standard Product and Services Classification.



Virtual acquisition card	Virtual credit card number with no associated physical copy that cannot be used for in-person point of sale (POS) transactions. It can only be used with a single merchant.
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3. Operational Requirements

3.1 Ariba Supplier Network account

The Contractor must become a member of the Ariba Supplier Network (ASN) and maintain its membership for the period of the Contract, including any option period if exercised.

The ASN is an e-business solution that connects buyers and contractors across different systems and processes. The CRA and the Contractor will use the ASN to communicate order related information:

Communication of new orders, changed orders and cancelled orders from the CRA to the Contractor.

Communication of additional order information and comments.

Communication of order confirmation and shipping notices from the Contractor to the CRA.

The Contractor must establish a minimum of 1 production and 1 test account.

3.2 Synergy catalogue

The Contractor must provide the CRA with a catalogue in a CSV format as defined under [section 4 Technical Requirements](#) below. The catalogue must include all goods and services as identified in the Annex "A" SOW and in accordance with the terms of the Contract.

The catalogue must include:

1. The product names and descriptions in both official languages (English and French). Goods/services must be available for the duration of the Contract as well as any exercised option period(s) or be replaced with agreed upon substitutions.
2. An image file for each good under the Contract.

The Contractor must notify the CRA via email, within one (1) business day, when a product becomes discontinued or otherwise unavailable, or is backordered for longer than five (5) business days.

The CA must approve the catalogue before it will be made available in Synergy. All catalogue updates, scheduled or otherwise, will only go into effect after the CRA approves, tests and loads the revised catalogue.

3.3 Acquisition card

The CRA will create a Synergy profile and link a Master Card virtual credit card number.

Synergy orders must be charged to the virtual card number provided by the CRA (see [section 4.3](#) below).

The CRA acquisition card is currently a MasterCard provided by Bank of Montreal. The CRA reserves the right to change its acquisition card type or provider at any time during the period of the Contract, including any exercised option period(s).

It is the Contractor's responsibility to have a mechanism in place (usually through a third party provider) to transmit charges to the Bank of Montreal.

3.4 Processing requirements

- The Contractor must:
- Validate the contents of each order to ensure accuracy.
- Error/discrepancy handling capability - In the case of a discrepancy between the CRA order information and the Contractor, the Contractor shall notify the CRA within thirty (30) minutes of occurrence and resolve the issue as per the timelines for Severity 3 in section 7 below.



- Send an order confirmation within 30 minutes of receiving a purchase card order, a change or cancellation from the CRA and a shipping notice with the invoice attached when goods are shipped or services are rendered.
- Charge the CRA virtual card issued for the Contract; partial orders may be charged, only for the goods that have been shipped and/or the services that have been rendered.
- Obtain written authorization from the CRA before substituting items or rejecting an order.
- Virus-scan attachments sent over the ASN, if any.
- For goods: Include a packing slip with each shipment.
- For services: Provide an invoice with the details of the services provided.
- Both the packing slip and invoice must specify the Contractor's name, address, and GST registration number, as well as the Synergy PCO number, CRA Purchaser, date the goods were shipped or services delivered, description of the goods and/or services, cost (before tax), applicable taxes, and total amount to be charged to the CRA.

3.5 Support

The Contractor must provide CRA with support:

- Through a single point of contact to report issues regarding maintenance and support of the catalogue, problem reporting and problem resolution updates.
- Coverage from 8:00AM to 5:00PM Eastern Time, Monday to Friday, excluding statutory holidays.
- For all incidents identified by either the Contractor or the CRA, the Contractor must adhere to the response time requirements detailed below. Incidents are assigned a tracking number, which will be communicated via email to the Contractor. Upon resolution, the Contractor must reply to the initial email with problem resolution details.

Table 1: Response time requirements		
Severity level	Description	Response and resolution times
Severity 1	System outage - The Contractor can neither accept nor process orders.	The Contractor must immediately notify the CRA Contracting Authority. The Contractor must also issue progress reports and maintain communication (verbal and email) with the CRA every two (2) hours until problem resolution, within business hours (8AM to 5PM Eastern Time, Monday to Friday, excluding Government of Canada holidays). The Contractor must make every attempt to resolve the issue within 24 hours.
Severity 2	The system is operational, but with severely restricted functionality or degradation. For example, the Contractor cannot process acquisition card charges.	The Contractor must notify the CRA Contracting Authority within thirty (30) minutes of occurrence. The Contractor must also issue a verbal and email progress report and maintain communication with the CRA every business day until problem resolution. The Contractor must make every attempt to resolve the issue within 48 hours.
Severity 3	The system is operational, but with functional limitations or restriction not critical to the overall operations. Examples include billing errors or spelling mistakes in item descriptions.	The Contractor must notify the CRA Contracting Authority within thirty (30) minutes of occurrence. The Contractor must also issue an email progress report and maintain communication when requested by the CRA. The Contractor must make every attempt to resolve the issue within 5 business days.



3.6 Contractor’s automated interface

The Contractor may automate their interface to the ASN. If they do, the Contractor must:

- Notify the CRA Contracting Authority of any changes to their interface system(s) a minimum of forty (40) business days in advance to allow the CRA to assess their impact on Synergy.
- Retest the ordering process and transmission of Level 2 credit card transaction data against the requirements set out in the Contract and successfully complete a new PoSC test before implementing the system changes.

4. Technical Requirements

4.1 Catalogue format

The catalogue must be created in a CSV format.

- The CRA requires that all catalogues be bilingual. The Contractor is required to enter two lines in their catalogue for each unique product: the first line will contain descriptions in English; the second line will contain descriptions in French.
- The Contractor should provide an image file for each unique product (if applicable). The image file must be in jpeg format with a maximum size of 1MB – 250X250 pixels. The image file must be named with the exact name and case as stated in the Image field of the catalogue format file.
- The Contractor must email the catalogue to the CA in CSV format along with the jpeg files for the pictures (if applicable).

4.2 Catalogue content

The following table details the fields required from the Contractor in the catalogue.

Please note:

- Some content is case sensitive, as indicated.
- These fields form one line in the file. Each product must appear twice, one for the English descriptions and another for the French descriptions.

Table 2 – Catalogue technical requirements				
Field name	To be filled by	Maximum field size	Field type	Description
Contractor ID	CRA			Leave this field blank.
Contractor Part ID	Contractor	128	Characters, case-sensitive	The Contractor’s part number. Special characters such as but not limited to , * ? and } are not supported.
Manufacturer Part ID	Contractor	128	Characters	The manufacturer’s part number.
Item Description	Contractor	2,000	Characters	The product’s long description in English or French; the language used must correspond to the language indicated in the Language field.
SPSC Code	Contractor	8	Integer number	The product commodity code in an eight digit UNSPSC format. For more information on UNSPSC codes and to search for



Table 2 – Catalogue technical requirements				
Field name	To be filled by	Maximum field size	Field type	Description
				UNSPSC code that best suits the product, refer to http://www.unspsc.org/ .
Unit Price	Contractor	10	Number with 2 decimal points	The CRA price for the product as per the contract.
Units of Measure	Contractor	2	Characters, case-sensitive	UN or ANSI X.12 standard unit of measure; the product's UOM (for example, BX for box and EA for each).
Lead Time	Contractor	3	Integer number	The number of business days between receipt of the order and delivery to purchaser.
Manufacturer Name	Contractor	50	Characters	Contractor's name or name of manufacturer.
Contractor URL	Contractor	100	Characters	Contractor's website address, in the format http://...
Manufacturer URL	Contractor	100	Characters	Contractor's manufacturer's website address, in the format http://...
Market Price	Contractor	10	Number with 2 decimal points	The list price or suggested retail price.
Short Name	Contractor	50	Characters	The product's short name in English or French; the language used must correspond to the language indicated in the Language field.
Expiration Date	CRA			Leave this field blank.
Effective Date	CRA			Leave this field blank.
Language	Contractor	5	Characters, case-sensitive	Use exactly: - en_CA if the line is for an English product description or - fr_CA for lines for a French product description.
Contractor Part Auxiliary ID	Contractor	5	Characters, case-sensitive	Use exactly: - en_CA if the line is for an English product description or - fr_CA for lines for a French product description.
Image	Contractor	50	Characters, case-sensitive	Name of the image file with jpeg extension. It may not contain special characters such as but not limited to , * ? and }. <i>Note: The image file sent to the CRA with the catalogue file must be named with the exact name stated in this column.</i>
Delete	CRA			Leave this field blank.
WHMIS	Contractor	3	Characters, case-sensitive	Identify hazardous materials. Use exactly: - Yes or No for English product descriptions or - Oui or Non for French product descriptions.



Table 2 – Catalogue technical requirements				
Field name	To be filled by	Maximum field size	Field type	Description
Green procurement	Contractor	3	Characters, case-sensitive	Identify product is certified Ecologo, is green or is an environmentally preferred product identified with a label. Use exactly: - Yes or No for English product descriptions or - Oui or Non for French product descriptions.
Strategically sourced				Leave this field blank.

4.3 Acquisition card format

Synergy uses a unique virtual acquisition card for all orders under the Contract.

The acquisition card charge must include level 2 transaction details. Level 2 details the CRA requires are:

- PCO Number, which is passed by the CRA to the Contractor through the ASN, maximum of 25 characters.
- GST/HST amount. Note: The Contractor must not charge PST in applicable provinces, as the federal government is PST exempt.
- The value charge must use “Actual” rather than “Estimated” tax.

Your third party service provider who transmits charges to financial institutions on your behalf will assist you in doing level 2 data transactions using their automated systems.

5. Proof of Synergy compliance test (PoSC)

A Proof of Synergy Compliance test (PoSC) must be completed following written notification by the Contracting Authority to validate that the Synergy requirements outlined in Annex A-10 are met. The PoSC test will be requested in accordance with any RFP prior to contract award or during the contract period, at CRAs discretion by exercising its irrevocable option to implement Synergy, as applicable.

The PoSC test must commence within five (5) business days of the written notification and must be successfully finalized twenty (20) business days thereafter. The testing period may be extended at the CRA’s sole discretion.

The PoSC test will validate the mandatory ASN relationship set-up, catalogue creation, order processing and charge transactions.

The CRA will appoint a coordinator as the Contractor’s point of contact for the duration of the test. Detailed procedures, timelines and a description of roles and responsibilities will be provided to the Contractor at the onset of the PoSC test.

5.1 Preparation for PoSC test

The Contractor must meet the following prerequisites to initiate the PoSC:

- Be a member of the ASN and have an ASN account.
- Be able to process level 2 acquisition card debits and credits.
- Identify a single point of contact for the duration of the test.

5.2 Testing of Synergy solution



The following table outlines step-by-step events and milestones for the PoSC test.

Table 3: Step-by-step process			
Event	Description	Owner	Participants
Kick-off meeting	Meeting to discuss PoSC requirements and timelines.	Contracting Authority	Contractor Coordinator
Step 1: Register on the Ariba Supplier Network (ASN)			
ASN relationship	The CRA establishes a relationship with the Contractor in ASN.	Coordinator	Contractor
ASN test account	The Contractor creates a test account on ASN.	Contractor	Ariba technical support
Step 2: Prepare the catalogue			
Catalogue build	The Contractor provides a catalogue and pictures if applicable in the required format.	Contractor	Contracting Authority
Catalogue finalization	The CRA reviews catalogue to ensure it respects contracting terms and adds custom CRA data aspectsaspects.	Contracting Authority	Coordinator
Step 3: Process a test order			
Acquisition card number	The CRA assigns a virtual card number to use during testing.	Coordinator	Contractor
Order testing	The CRA places a test order. Participants confirm notifications received.	Coordinator	Contractor
Step 4: Test charging purchases			
Charge testing	The Contractor charges for test order using Level 2 data	Contractor	Coordinator
Step 5: Test crediting purchases			
Credit testing	The Contractor credits the charge once confirmation of charging is sent.	Contractor	Coordinator
Step 6: Confirm completion of the test			
PoSC Testing Confirmation	Confirmation of success or failure of Contractor enablement.	Contracting Authority	Contractor Coordinator

Step 1 - Register on ASN

An ASN test account must be created to proceed with the PoSC test. Instructions to complete this step can be found at: <http://Contractor.ariba.com>.

Note: It is recommended that the test account be created with a user name based on the production user name prefixed with "test-".

Step 2 – Prepare catalogue

The Contractor must create the catalogue in a CSV format, as per section 4 [Technical Requirements](#) above. The catalogue must contain all the products and services under the Contract. For each good in the catalogue, an image in a JPEG format must be provided.



The Contractor must provide the catalogue and the image files to the CRA Contracting Authority by email or on USB.

The CRA will confirm:

- The catalogue can be loaded in Synergy.
- Descriptions and images comply with the format requested.

Step 3 – Process a test order

The CRA will create and send test orders using the provided catalogue, through the ASN to the Contractor. The CRA Coordinator will be available to assist with questions that arise during the following processing steps:

- a) Contractor is receiving notifications of new orders.
- b) Contractor is able to send order confirmations upon receipt of orders, change orders or cancel orders from the CRA.
- c) Contractor is able to send a shipping notice with attached invoice.

If collaboration for a proposal is involved before an order is complete, the following will also be tested:

- d) Contractor is able to view request for proposal.
- e) Contractor is able ask questions regarding the request for proposal.
- f) Contractor is able to complete the proposal by adding or deleting items (if required).
- g) Contractor is able to submit a proposal to the CRA.

Step 4: Test charging purchases

The Contractor must charge for the test order completed in the above test. For this test:

- PCO Number is PCOX123.
- GST/HST is \$0.13.
- Value charge is \$1.

Step 5: Test crediting purchases

Once the debit charge above has been received, the CRA Coordinator will inform the Contractor to proceed with the credit. The credit will reverse the above charge. The same information is required but dollar values are negative:

- PCO Number is PCOX123.
- GST/HST is - \$0.13.
- Value charge is - \$1.

Step 6: Confirm completion of the test

The CA will inform the Contractor of the PoSC test results



Annex B - Basis of Payment

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid:

- a) a firm all-inclusive hourly rates for the services of Guards at Posts and Escort Guards;
- b) a firm all-inclusive unit rate per alarm for the services of Alarm Response Guards;
- c) a firm all-inclusive unit rate per patrol for the services of Preventive Patrol Guards;
- d) a firm all-inclusive unit rate per lock/unlock perimeter door services.

Applicable taxes are extra.

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

Price Escalation/De-Escalation

Prices for the second and third year of the initial contract period, and optional periods of services (years 3 to 6), if exercised at the CRA's discretion, will be adjusted (either increased or decreased) in accordance with the following, as published by Statistics Canada.

The annual pricing adjustments will be calculated using the Statistics Canada's Consumer Price Index, monthly, not seasonally adjusted, as shown through the link below.

<http://www.statcan.gc.ca>

The prices of the previous contract year will be multiplied by the "%c change" published for the 12 month period preceding the contract anniversary date or the month preceding the month in which an option is exercised.

PRICING TABLES WILL BE INSERTED AT TIME OF CONTRACT AWRD, BASED ON THE FINANCIAL PROPOSAL



Annex C - Security Requirements Check List (SRCL)



Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat 1000349455
Security Classification / Classification de sécurité

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization Ministère ou organisme gouvernemental d'origine CRA	2. Branch or Directorate / Direction générale ou Direction SIAD	
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 National Guard Services		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
6. Indicate the type of access required - Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c) <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes		
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p.ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé. <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciales sans entreposage de nuit? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	
Not releasable À ne pas diffuser <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	
Restricted to: / Limité à: <input type="checkbox"/>	Specify country(ies): / Préciser le(s) pays: <input type="checkbox"/>	
Specify country(ies): / Préciser le(s) pays: <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>	
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	
Specify country(ies): / Préciser le(s) pays: <input type="checkbox"/>	Specify country(ies): / Préciser le(s) pays: <input type="checkbox"/>	
7. c) Level of information / Niveau d'information		
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>
PROTECTED B PROTÉGÉ B <input checked="" type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>
SECRET SECRET <input 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"/>

Security Classification / Classification de sécurité
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PART A (continued) / PARTIE A (suite)

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?
Short Title(s) of material / Titre(s) abrégé(s) du matériel: No / Non Yes / Oui
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

Security Classification / Classification de sécurité
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Contract Number / Numéro du contrat 1000349455
Security Classification / Classification de sécurité

PART C (continued) / PARTIE C (suite)

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

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

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	Confidential / Confidentiel	Secret	Top Secret / Très Secret	NATO Restricted / NATO Diffusion Restreinte	NATO Confidential	NATO Secret	COSMIC Top Secret / COSMIC Très Secret	Protected / Protégé			Confidential / Confidentiel	Secret	Top Secret / Très Secret
											A	B	C			
Information / Assets / Renseignements / Biens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Media / Support TI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT Link / Lien électronique	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

12. b) Will the document 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).

Security Classification / Classification de sécurité
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Annex D – Confidentiality Certifications

Confidentiality: Canada Revenue Agency Acts

PRIOR TO SIGNING THIS DOCUMENT, THE CONTRACTOR IS REQUIRED TO READ SECTIONS 239 AND 241 OF THE INCOME TAX ACT <http://laws-lois.justice.gc.ca/eng/acts/I-3.3/> , AND SECTIONS 295 AND 328 OF THE EXCISE TAX ACT <http://laws-lois.justice.gc.ca/eng/acts/e-15/>

I _____, the Contractor, as a person engaged by or on behalf of Her Majesty in right of Canada, certify that I have read Sections 239 and 241 of the Income Tax Act, and Sections 295 and 328 of the Excise Tax Act and that I understand that I am subject to and promise to comply with those provisions.

I will use the services of any person(s) I require in order to carry out my responsibilities under the Contract. If I employ such person(s) or contract for their services, I will also pay their remuneration and all related expenses. I will also engage all such persons whose services are to be utilized, on behalf of Her Majesty in right of Canada, for the purposes of Sections 239 and 241 of the Income Tax Act, and Sections 295 and 328 of the Excise Tax Act. I will require each person so engaged, as a pre-condition to assisting me in carrying out my responsibilities under the Contract, to sign a document (see page two (2) of this Annex) stating that he or she has read the provisions of Sections 239 and 241 of the Income Tax Act, and Sections 295 and 328 of the Excise Tax Act and understands that he or she must comply with such provisions.

I will provide copies of all executed acknowledgement documents to the representative of the Commissioner of Revenue.

CONTRACTOR

Name (please type)

Authorized representative's name (please type)

Title (please type)

Signature

Date



Confidentiality: Canada Revenue Agency Acts

PRIOR TO SIGNING THIS DOCUMENT, THE EMPLOYEE OF THE CONTRACTOR IS REQUIRED TO READ SECTIONS 239 AND 241 OF THE INCOME TAX ACT <http://laws-lois.justice.gc.ca/eng/acts/I-3.3/>, AND SECTIONS 295 AND 328 OF THE EXCISE TAX ACT <http://laws-lois.justice.gc.ca/eng/acts/e-15/>

Between the Commissioner of Revenue and _____, the Contractor and _____ the employee (or consultant or subcontractor, etc.).

I, _____, acknowledge that I am employed by the Contractor, and will assist the Contractor in carrying out the Contractor’s duties under the Contract.

I acknowledge that I am engaged by the Contractor on behalf of Her Majesty the Queen in right of Canada for the purposes of Section 241 of the Income Tax Act, and Section 295 of the Excise Tax Act and therefore, for the purpose of the Contract, am an “official” as that term is defined in the named provisions of the named Statutes.

I hereby acknowledge that I am legally obliged to abide by and have read the provisions in Sections 239 and 241 of the Income Tax Act, and Sections 295 and 328 of the Excise Tax Act, that I understand them, and promise to comply with them.

I agree to use the knowledge and information obtained by me during the time that I was assisting and for the purpose of assisting the Contractor, or any knowledge or information prepared from such knowledge or information, solely to assist the Contractor in carrying out the Contractor’s duties under the Contract and I acknowledge and certify that I will not use such knowledge and information for any other purpose whatsoever. Without restricting the generality of the foregoing, I agree that I will not use any research or intellectual property obtained while assisting the Contractor in carrying out the Contractor’s duties under the contract, in the course of my own research, in the course of my work as a consultant, or in any scientific or technological endeavour whatsoever.

I hereby agree to take all the security precautions needed to ensure that the research, intellectual property and trade secrets obtained by me during the performance of the Contract are secure at all times from use not permitted by the subcontract, by any other person whatsoever, including unauthorized use by the Contractor’s employees and the sub-contractors engaged by the Contractor.

CONTRACTOR

Contractor name (please type) _____ Date _____

**EMPLOYEE /
CONSULTANT/
SUBCONTRACTOR**

Employee/Consultant/Subcontractor name (please type) _____ Date _____

Signature



Annex E: Insurance Requirements

Commercial General Liability Insurance

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 \$5,000,000 per accident or occurrence and in the annual aggregate.

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 Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.
- 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.

Comprehensive Crime Insurance

The Contractor must obtain Comprehensive Crime (Fidelity) insurance on a Blanket basis, and maintain it in force throughout the duration of the Contract period, in an amount as listed below:

- a. Insuring Agreement 1: Employee Dishonesty (Form A) in an amount of not less than \$50,000 covering all employees of the Contractor. Such Fidelity Insurance must contain a "Third-Party Extension" or "Client Coverage" extending such coverage to Canada with respect to the risks associated with this agreement.
- b. Agreement II/III: Money & Securities Loss Inside Premises/Outside Premises in an amount not less than \$100,000;

The Comprehensive Crime insurance must include the following:

- a. 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.
- b. Loss Payee: Canada as its interest may appear or as it may direct.



Automobile Liability Insurance

The Contractor must obtain Automobile 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. The policy must include the following:

- a. Third Party Liability - \$2,000,000 Minimum Limit per Accident or Occurrence
- b. Accident Benefits - all jurisdictional statutes
- c. Uninsured Motorist Protection
- d. 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.