



**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 Online Survey Tool	
Solicitation No. – No de l'invitation 1000348876	Date (yyyy-mm-dd) (aaaa-mm-jj) 2020-03-11
Solicitation closes – L'invitation prend fin on – le (yyyy-mm-dd) (aaaa-mm-jj) 2020-04-20 at – à 2:00 P.M. / 14 h	Time zone – Fuseau horaire EDT/HAE Eastern Daylight Time/ Heure Avancée de l'Est
Contracting Authority – Autorité contractante Name – Nom : Timothy Berg Address – Adresse : 250 Albert St. Ottawa, ON, K1A 0L5 E-mail address – Adresse de courriel : timothy.berg@cra-arc.gc.ca	
Telephone No. – No de téléphone (613) 946-2100	
Fax No. – No de télécopieur (613) 957-6655	
Destination - Destination See herein / Voir dans ce document	



Request for Proposal (RFP)

Title: Online Survey Tool

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

Appendices

Appendix 1: Mandatory Criteria

Appendix 2: Point Rated Criteria

Appendix 3: Financial Proposal

Part 6 Model Contract: includes the clauses and conditions and any annexes that will apply to any resulting contract.

Annexes

Annex A: STATEMENT OF REQUIREMENT

Annex B: BASIS OF PAYMENT



1.2 Summary

The Canada Revenue Agency (CRA) has a requirement for access to an externally hosted online survey tool for fifteen (15) CRA Users to manage, conduct and generate analytics for Public Opinion Research (POR).

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.

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 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.

2.2 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
A3015T	Certifications	2014-06-26
C3011T	Exchange Rate Fluctuation	2013-11-06

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 <http://www.cra-arc.gc.ca/gncy/prcrmnt/menu-eng.html>.
2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier subcontractors, 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 one hundred and twenty (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 (7) 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 Requirement (SOR). 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 SOR 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)

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.

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

Section I: Technical Bid (4 hard copies and 1 soft copy CD or DVD)

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 (1 hard copy and 1 soft copy on CD or DVD)

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.

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

Section III: Certifications (1 hard copy)

Bidders must submit the certifications required under Part 5.

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 Appendices 1, 2 and 3 and in conjunction with the Statement of Requirement (SOR). 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.

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 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.

Step 4 – Basis of Selection

SACC Manual Clause A0027T (2012-07-16), Basis of Selection – Highest Combined Rating of Technical Merit and Price.

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 100 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 200 points.
2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an **example** where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points equals 200 and the lowest evaluated price is \$50,000 (50).



Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)				
		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		160/200	115/200	180/200
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$70,000.00
Calculations	Technical Merit Score	$160/200 \times 70 = 56$	$115/200 \times 70 = 40.25$	$170/200 \times 70 = 59.50$
	Pricing Score	$50/55 \times 30 = 27.27$	$50/50 \times 30 = 30$	$50/70 \times 30 = 21.42$
Combined Rating		83.27	70.25	80.92
Overall Rating		1st	3rd	2nd

Step 5 – 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” of this RFP.

Step 6 – Proof of Proposal Testing

The Bidder with the highest ranked responsive bid as defined in Step 4 will proceed to the Proof of Proposal Testing phase of the evaluation; The Contracting Authority may request the Bidder to provide their proposed solution for demonstration and Proof of Proposal (POP) testing at a CRA designated site, with the participation and assistance of the Bidder.

The Contracting Authority will provide the Bidder with a listing of the mandatory and rated requirements that will be subjected to validation by the Contracting Authority a minimum of ten (10) calendar days before the Bidder’s scheduled Proof of Proposal Testing date. We reserve the right to test any or all mandatory or point rated criteria in the RFP and any requirements outlined in the SOR.

The CRA may request that the Bidder provide supporting documentation to demonstrate compliance of the proposed solution with the requirements outlined in Annex A. Supporting documentation may include but is not limited to brochures, specification sheets, diagrams, product guides, and test reports. In the event that the CRA makes such a request, the Bidder must provide the Contracting Authority with the required documentation within five (5) business days.

The purpose of the Proof of Proposal will be to validate the Bidder’s proposal and proposed solution related to the mandatory and point-rated requirements. If there is an obvious discrepancy between the product or the performance of the products provided for Proof of Proposal Testing and the solution proposed in the Bidder’s proposal, CRA reserves the right to conduct whatever further tests are required to validate the Bidder’s proposal.

Within twenty-one (21) calendar days of a request from the Contracting Authority, the Bidder with the highest ranked responsive bid must deliver their solution ready for test at a CRA designated site in the Canada National Capital Region (to be determined prior to Bidder notification). The CRA will assume all costs related



to the facilities provided, the required infrastructure (i.e. the CRA network) and CRA employees. All Bidder costs, including delivery of the solution and support during the POP will be the responsibility of the Bidder. The CRA will conduct all tests utilizing CRA developed test procedures.

The Proof of Proposal testing timeline shall not exceed ten (10) working days, unless extended in writing by the Contracting Authority at CRA's sole discretion. If a deficiency is detected during the Proof of Proposal, the Bidder will have the opportunity to correct any deficiencies (including the provision of replacement equipment) during the Proof of Proposal testing, provided that all deficiencies are corrected within the ten (10) working days testing timeline.

If the proposed solution fails to meet one of the tested mandatory requirements of the SOR at the end of the ten (10) working day test period, the bid will be declared non-responsive. The Bidder will remove their solution from the test site and CRA will invite the Bidder with the next highest ranked responsive bid to participate in the Proof of Proposal testing phase of the evaluation.

If the proposed solution fails to meet one of the tested point-rated requirements of Appendix 2: Point Rated Criteria at the end of the ten (10) working day test period, the Bidder's proposal will be re-evaluated to adjust the point-rated scoring assessed for each applicable criterion. Steps Two, Three and Four will be repeated to reassess the bids and should the Bidder no longer be the highest-ranked responsive bid, the Bidder will remove their solution from the test site and CRA will invite the bidder with the next highest ranked responsive bid to participate in the Proof of Proposal testing phase of the evaluation.

CRA reserves the right to conduct POP testing after Contract Award at its sole discretion.

Step 7 – Contract Entry

The Bidder(s) 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.

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 Contract issued subsequent to contract award, including but not limited to Contract Amendments and Task Authorizations.

(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
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_____ 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 Authority to Grant License

The Bidder hereby warrants that either:

- i. They own the intellectual property rights for all proposed software; or
- ii. They have the full right and authority, granted by the owner of the software, to license all of the proposed software to CRA in accordance with the software license terms and conditions set out in this RFP.

Signature of authorized representative: _____

5.2.2 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.

5.2.3 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 (<https://www.canada.ca/en/employment-social->



development/programs/employment-equity/federal-contractor-program.html#afed) 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.

5.2.4 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 placed 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)



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.

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.

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.

The Bidder must substantiate how its proposed solution meets the specific mandatory requirements below. The substantiation must not simply repeat of the requirements, but must explain and demonstrate how the Bidder will meet the requirements and carry out the required Work.

The substantiation may refer to additional documentation submitted with the bid. Bidders are requested to indicate where in the bid the reference material can be found, including the title of the document, and the page and paragraph numbers. If the reference is not sufficiently precise, Canada may request that the Bidder direct Canada to the appropriate location in the documentation.

If Canada determines that the substantiation is not complete, the Bidder will be declared non-responsive and disqualified.

1.0 MANDATORY REQUIREMENTS

#	Mandatory Requirement Description	Supporting Documentation Details/Bid Reference
M1	<p>The Online Survey Tool must protect against:</p> <ul style="list-style-type: none"> • upload file exploits, including but not restricted to Word, PDF, image, audio, and video file types; and • unauthorized third-party access, and • viruses, and • injection attacks including structured query language (SQL) and cross-site scripting (XSS) attacks, and • denial of service (DoS) attacks, and • spamming activities. 	
M2	<p>The Online Survey Tool must collect and store all Content for the duration of the contract.</p>	



#	Mandatory Requirement Description	Supporting Documentation Details/Bid Reference
M3	The Online Survey Tool must provide English and French interfaces.	



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.

All point rated criteria that are included in the winning bidders proposal, will be added to Annex A, Statement of Requirement (SOR), and will form part of the resulting contract(s).

TABLE A

In order to demonstrate compliance with the following point rated criteria, the Bidder must provide supporting documentation within their proposal.

#	Rated Requirements	Rating Scale	Supporting Documentation Details/Bid Reference
TOOL SPECIFICATIONS			
R01	The Online Survey Tool should be hosted entirely on secure, reliable servers and all data stored in Canada. In order to demonstrate compliance, the Bidder must provide the location of the servers.	No – 0 points Yes – 10 points	
R02	Data transmissions and processing initiated in one part of Canada to a Canadian server should be routed exclusively through Canadian networks. In order to demonstrate compliance, the Bidder must provide the location of where the data is collected and how the data is maintained in Canada.	No – 0 points Yes – 10 points	
R03	The Online Survey Tool should be compatible with Security Assertion Markup Language (SAML) 2.0 and should allow for potential CRA on-premises administrator credentials federation. In order to demonstrate compliance, the Bidder must provide details on how the service is compatible with SAML 2.0.	No – 0 points Yes – 5 points	
R04	The Online Survey Tool should meet Web Content Accessibility Guidelines (WCAG) 2.0 at the AAA level. In order to demonstrate compliance, the Bidder must provide proof that the Bidder’s Tool has been evaluated by a independent third party and was deemed to meet the levels specified.	No – 0 points Yes – 10 points	



#	Rated Requirements	Rating Scale	Supporting Documentation Details/Bid Reference
SURVEY TOOL DESIGN & FUNCTIONALITY			
R05	<p>The Online Survey Tool should allow Survey Respondents to upload images and videos.</p> <p>In order to demonstrate compliance, the Bidder must provide:</p> <ul style="list-style-type: none"> a) details on the types of files that can be uploaded; and b) details on if there are any limits to the number of file uploads, and, c) details on if there are any limits to the size of the file uploads. 	<p>The Tool allows for uploading of a minimum of 8 files per user and per question of at least 8MB per file. = 5 points</p> <p>The Tool has no restrictions on the number of files uploaded, and has no maximum file size limit on uploaded files. = 10 points</p> <p>Maximum of <u>10 points</u> to be awarded</p>	



TABLE B

In order to demonstrate compliance with the following point rated criteria, the Bidder must indicate YES in the Bidder Response column. These criterion will be tested during the POP testing.

#	Rated Requirements	Rating Scale	Bidder Response YES/NO
SURVEY TOOL DESIGN & FUNCTIONALITY			
R06	The Online Survey Tool should allow CRA Users to hide a page, disable questions and response choices while maintaining the data that has been previous collected on those elements;	No – 0 points Yes – 10 points	
R07	The Online Survey Tool should provide Email Trigger notifications;	No – 0 points Yes – 10 points	
R08	The Online Survey Tool should allow CRA Users to perform Looping;	No – 0 points Yes – 10 points	
R09	The Online Survey Tool should allow for Timer questions to be used in survey design. A timer question allows CRA Users to track the time a respondent spends on a question, page or on the survey;	No – 0 points Yes – 5 points	
R10	The Online Survey Tool should allow for Semantic differential questions to be used in the survey design. Semantic differential is a scale question with two opposite end-points and some middle options;	No – 0 points Yes – 5 points	
R11	The Online Survey Tool should allow for Multi-type questions to be used in survey design - A question type allowing for different response types (i.e. radio button, textbox, drill down) for different levels within the same question;	No – 0 points Yes – 10 points	
R12	The Online Survey Tool should allow for Image choice questions to be used in survey design;	No – 0 points Yes – 10 points	
R13	The Online Survey Tool should have the ability to score/tally display. This allows for the Survey Respondents to see their scores in real-time;	No – 0 points Yes – 5 points	
R14	The Online Survey Tool should have a fully accessible drag and drop ranking questions;	No – 0 points Yes – 5 points	
R15	The Online Survey Tool should allow CRA Users and Survey Respondents to Insert audio files into surveys;	No – 0 points Yes – 5 points	
R16	The Online Survey Tool should allow CRA Users to create short or vanity URL's for each survey;	No – 0 points Yes – 10 points	



#	Rated Requirements	Rating Scale	Bidder Response YES/NO
R17	The Online Survey Tool should allow CRA Users to embed surveys in a website or blog;	No – 0 points Yes – 5 points	
DATA COLLECTION			
R18	The Online Survey Tool should allow CRA users a to create an unlimited number of Collectors and to use the Collector as a variable when developing survey logic;	No – 0 points Yes – 5 points	
R19	The Online Survey Tool should allow CRA Users to insert images into the invitations and be HTML friendly;	No – 0 points Yes – 5 points	
R20	The Online Survey Tool should allow CRA Users to schedule messages to send at a later date;	No – 0 points Yes – 5 points	
R21	The Online Survey Tool should allow CRA Users to recall email invitations;	No – 0 points Yes – 5 points	
ANALYTICS			
R22	The Online Survey Tool should allow CRA users to import responses (bulk or individual);	No – 0 points Yes – 10 points	
R23	The Online Survey Tool should provide Basic Text Analysis;	No – 0 points Yes – 10 points	
REPORTING			
R24	The Online Survey Tool should allow CRA users to create a reporting link (URL) that allows for results to be shared;	No – 0 points Yes – 10 points	
DATA EXPORT			
R25	The Online Survey Tool should allow CRA users to export reports to Microsoft PowerPoint;	No – 0 points Yes – 5 points	
R26	The Online Survey Tool should allow CRA users to export reports to PDF;	No – 0 points Yes – 5 points	
R27	The Online Survey Tool should allow CRA users to export the survey questionnaire to PDF.	No – 0 points Yes – 5 points	
TOTAL MAXIMUM SCORE (TABLE A & B)		200	



Appendix 3: Financial Proposal

The Bidder must submit their financial bid in accordance with the Basis of Payment in Annex B.

Bidders must submit firm all-inclusive annual rates per user, in Canadian funds, Applicable taxes excluded, for the provision of the services outlined in Annex A “Statement of Requirement”, including any point rated criteria requirements offered by the Bidder in Appendix 2.

Firm All-Inclusive Annual Rate Per User for Access to the Online Survey Tool

Period	A	B	C
	Firm All-Inclusive Annual Rate Per User	Number of Users	Extended Price (AxB)
Initial Contract Period		15	
Option Period 1		15	
Option Period 2		15	
Option Period 3		15	
Option Period 4		15	
Bid Evaluation Price:			



Part 6 Model Contract

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

6.1 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.

6.2 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.

6.3 Requirement

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

6.3.1 Period of Contract

The period of the Contract is one (1) year from Contract Award.

6.3.2 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to four (4) additional one (1) 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.

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

The Contractor grants to Canada the irrevocable option to acquire additional user licenses described at Annex A: Statement of Requirement of the Contract under the same terms and conditions and at the prices and/or rates stated in the Contract. The total annual price for additional users added to the contract will be prorated in accordance with the remaining period of 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.



6.4 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the Standard Acquisition Clauses and Conditions Manual 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	Foreign Nationals (Canadian Contractor)	2006-06-16
A2001C	Foreign Nationals (Foreign Contractor)	2006-06-16
A3015C	Certifications - Contract	2014-06-26
A9065C	Identification Badge	2006-06-16
A9068C	Government Site Regulations	2010-01-11
A9113C	Handling of Personal Information	2014-11-27
A9117C	T1204 – Direct Request by Customer Department	2007-11-30
C6000C	Limitation of Price	2011-05-16
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
H1000C	Single Payment	2008-05-12
H3028C	Advance Payment	2010-01-11

6.5 General Conditions

2030 (2016-04-04) General Conditions – Higher Complexity - Goods, 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 23 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 23 remains unchanged.

Section 43 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.

6.6 Supplemental Terms and Conditions

4003 (2010-08-16), Supplemental General Conditions - Licensed Software, modified as follows, shall apply to and form part of the Contract.

At section 1 titled "Interpretation" insert the following definition:

The "Licensee" under the Contract is Her Majesty the Queen in right of Canada, acting through and represented by the Commissioner, Canada Revenue Agency.

At section 2 titled "License Grant" delete subsection 2 and replace with the following:

If the Client is reconfigured, absorbed, in whole or in part, by another government department or agency, or is disbanded entirely, Canada may, by giving notice to the Contractor, designate another department or agency as the Client for all or part of the Licensed Software.

At section 08 titled "Licensed Software Transfer", delete this article in its entirety and replace with the following:

The license to use the Licensed Software under the Contract is transferable by Canada, in whole or in part, under the same conditions of the Contract, to any Device or Client, as applicable, or to any Canadian government department, corporation or agency, as defined in the *Financial Administration Act, R.S.C. 1985, c.F-11*, as amended from time to time, or to any other party for which the Department of Public Works and Government Services Canada has been authorized to act under section 16 of the *Department of Public Works and Government Services Act, S.C. 1996, c.16*, as long as Canada informs the Contractor of the transfer within thirty (30) days of the transfer occurring.

At Section 11 titled "Term of License" delete subsection 2 and replace with the following:

The Contractor may terminate Canada's license with respect to the licensed software by giving the Contracting Authority written notice to that effect only if Canada is in breach of its license in accordance with the license rights granted in the Contract, or Canada fails to pay for the license in accordance with the Contract, and only if that breach continues for a period of ninety (90) days after the Contracting Authority received written notice from the Contractor giving particulars of the breach and the Contracting Authority has validated the particulars of the breach. If Canada's license is terminated, once Canada has corrected the breach, the Contractor shall re-instate Canada's license with respect to the licensed software under the exact same terms and conditions as granted in the contract for the license, at no additional cost.

At section 15 titled "Warranty", insert the following:

Notwithstanding section 15.0 – Warranty, the Contractor's warranty for the Solution shall include the provision of all software maintenance and support services detailed in supplemental general conditions 4004 – Support Services for Licensed Software except that "Warranty Period" as defined therein is hereby amended by deleting the reference to a period of ninety (90) days and replacing ninety (90) days with one (1) year. The warranty period of twelve (12) months shall commence on the final acceptance date of the delivered Equipment.



Section 18 titled "Risk of Loss" insert the following after subsection 2:

3. The Contractor warrants:

Unless authorized in writing by the Project Authority, or necessary to perform valid duties under the Contract any programs developed by the Contractor under the Contract or provided to Canada by the Contractor for use by the Client shall:

- i. not replicate, transmit, or activate itself without control of the person operating the computing equipment on which it resides;
- ii. not alter, damage, or erase any data or computer programs without control of a person operating the computing equipment on which it resides; and
- iii. contain no key, node lock, time out or other function, whether implemented by electronic, mechanical or other means, which restricts or may restrict use or access to any programs or data developed under the Contract, based on residency on a specific hardware configuration, frequency or duration of use, or other limiting criteria.

Provided and to the extent any program has any of the foregoing attributes, and notwithstanding anything elsewhere in the Contract to the contrary, the Contractor shall be in default of the Contract, and no cure period shall apply. In addition to any other remedies available to it under the Contract, the Crown reserves the right to pursue any civil and/or criminal penalties available to it against the Contractor. The Contractor agrees, in order to protect the Crown from damages, which may be intentionally or unintentionally caused by the introduction of Illicit Code to the Client's computer network, no software will be installed, executed, or copied on Client equipment without the express approval of the Project Authority.

4004 (2013-04-25), Supplemental General Conditions - Maintenance and Support Services for Licensed Software, shall apply to and form part of the Contract.

6.7 Software License Type

The Contractor hereby grants an annual, non-exclusive, freely transferable User License to Her Majesty the Queen in right of Canada for the software and number of Users listed in Annex A. The term "User" and "User License" shall have the meanings set out in supplemental general conditions 4003 (2010-08-16), Licensed Software.

6.8 License Terms and Conditions – Shrink-Wrap or Click

The parties agree that only the conditions expressly set out in the Contract or incorporated by referenced in the Contract form part of the Contract. Any conditions accompanying or enclosed with the Licensed Software, if any, do not form part of the Contract and, therefore, are not part of Canada's license and do not affect the rights of the Parties in any way. The Contractor agrees that in no event will Canada or any Client or User be required to enter into any additional license agreement with respect to the Licensed Software or any portion of it. The Contractor acknowledges that any additional license agreement relating for the Licensed Software signed by anyone other than the Contracting Authority is void and of no effect.



Canada is not bound by and does not accept any “shrink-wrap” or “click-wrap” conditions or any other conditions, expressed or implied, that are contained in or on the software packaging or conditions that may accompany the software in any manner, regardless of any notification to the contrary.

6.9 Security Requirements

Contractor personnel must be escorted at all times while on CRA premises.

6.10 Authorities

6.10.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Timothy Berg

Telephone Number: (613) 946-2100

Fax Number: (613) 957-6655

E-mail address: timothy.berg@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.

6.10.2 Project Authority

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.

6.10.3 Contractor’s Representative

To be completed at the time of Contract award.

Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____



6.11 Travel and Living Expenses

The CRA will not cover any travel and living expenses.

6.12 Delivery

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

6.13 Inspection and Acceptance

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

6.14 Basis of Payment

Refer to Annex B: Basis of Payment.

6.15 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.

6.15.1 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 18 – Payment Period and Article 19 - Interest on Overdue Accounts, set out in 2030 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 18 – Payment Period and Article 19 - Interest on Overdue Accounts, set out in 2030 General Conditions (2016-04-04) forming part of the Contract will not apply, until the Contractor corrects the matter.

6.15.2 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 18 – Payment Period and Article 19 - Interest on Overdue Accounts, set out in 2030 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.

6.15.3 Payment by Cheque

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

6.16 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.

6.17 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.



6.18 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 Ontario.

6.19 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. the supplemental general conditions 4003 (2010-08-16) – Licensed Software;
3. the supplemental general conditions 4004 (2013-04-25) – Maintenance and Support Services for Licensed Software;
4. the General Conditions 2030 (2016-04-04) – Higher Complexity – Goods;
5. Annex A: Statement of Requirement;
6. Annex B: Basis of Payment;
7. The Contractor's proposal dated (insert date of bid), as amended on (insert date(s) of amendment(s), if applicable).

6.20 Refund to the Crown in the Event of Termination

Notwithstanding Article 32 of 2030 (2016-04-04), "Termination for Convenience", General Conditions – Higher Complexity – Goods; in the event of termination of services for which an advance payment has been made, charges up to the date of termination will be calculated by prorating on the basis of a twelve (12) month year and thirty (30) day month, and the Contractor shall immediately refund to Canada the unliquidated portion of the advance payment and pay to Canada interest thereon, from the date of the advance payment to the date of the refund, at the discount rate of interest per annum set by the Bank of Canada and prevailing on the date of the advance payment, plus 1 ¼ percent annum.

6.21 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.



6.21.1 Procurement Ombudsman

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.

6.21.2 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 contractor 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.

6.22 Intellectual Property Right Infringement

1. If a third party claims that equipment or software that the Contractor provides under the Contract infringes any intellectual property right, the Contractor, if requested to do so by Canada, will defend Canada against the claim at the Contractor's expense. In this regard, the Contractor will pay all costs, damages and legal fees that a court finally awards, provided that Canada:
 - a. promptly notifies the Contractor in writing of the claim; and
 - b. co-operates with the Contractor in, and allows the Contractor full participation in, the defense and related settlement negotiations; and
 - c. obtains the Contractor's prior approval to any agreement resulting from settlement negotiations held with the third party.
2. The Contractor shall participate in any claims, action or proceeding arising under subsection 1 and no such claim, action or proceeding shall be settled without the prior written approval of the Contractor and Canada.
3. If such a claim is made or appears likely to be made, Canada agrees to permit the Contractor to enable Canada at the Contractor's expense, to continue to use the equipment or software or to modify or replace it with equipment or software, which has published specifications equal or superior to the equipment or software being replaced. If the Contractor determines that none of these alternatives is reasonably available, Canada may elect, at the Contractor's expense, to independently secure the right to continue to use the equipment or software, or Canada may require the Contractor to accept the return of the equipment or software and to refund all monies paid to the Contractor under the Contract for the equipment and software, as well as all amounts paid for services and license and development fees.
4. The provisions of subsections 1 and 2 do not apply in situations where the Contractor was instructed by Canada to purchase a specific item of equipment or software from a specific source on behalf of



Canada. In this case, the Contractor shall ensure that its subcontract for the equipment or software states that "If a third party claims that equipment or software that the subcontractor supplies under the Contract infringes any intellectual property right, the subcontractor, if requested to do so by either the Contractor or Canada, will defend the Contractor and Canada against that claim at the subcontractor's expense and will pay all costs, damages and legal fees that a court finally awards." In the event that the Contractor is unable to incorporate this into its subcontract, then it shall advise Canada of the situation and not proceed with the subcontract without receiving written notice from Canada that the level of intellectual property right infringement protection is acceptable.

5. Without prejudice to Canada's right to terminate the Contract for default prior to completion of the work, the above represents the Contractor's entire obligation to Canada regarding any claim of infringement.
6. The Contractor has no obligation regarding any claim based on any of the following:
 - a. Canada's unauthorized modification of the equipment or software, or Canada's unauthorized use of the equipment or software in other than its published specified operating environment;
 - b. the combination, operation or use of the equipment or software with any product, data or apparatus that the Contractor did not provide under the Contract, or which combination, operation or use the Contractor did not authorize or approve in advance, if infringement would not have occurred but for such combination, operation or use.



Annexes

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

ANNEX A: STATEMENT OF REQUIREMENT

ANNEX B: BASIS OF PAYMENT



Annex A - Statement of Requirement

1.0 TITLE

Online Survey Tool

2.0 SCOPE AND OBJECTIVE

The Canada Revenue Agency (CRA) has a requirement for access to an externally hosted online survey tool for fifteen (15) CRA Users to manage, conduct and generate analytics for Public Opinion Research (POR).

3.0 GLOSSARY

Term	Definition
Branching	The ability to customize the survey according to the responses to specific questions or certain characteristics specific to the respondent
Business Day	Monday to Friday, excluding any Canadian federal statutory holidays.
Business Hours	7:30 AM to 8:00 PM, Eastern Time (Ottawa)
Content	Content refers to survey responses and any data or information that is generated, used, or uploaded into the tool by CRA Users (e.g. questionnaires, contact lists, images, videos)
Mobile Device and Smartphone Friendly	The ease of use, navigability, and overall performance of an electronic platform on mobile devices.
Response Validation	The ability to verify a respondent's choice based on certain characteristics (e.g. pick the top 3, respondent would receive an error if selected 4 options)
Piping	The ability to carry a respondent's answer from one question to the next depending on the options selected
Reliability	Host servers with no less than 0.1% downtime (99.9% uptime) outside of regularly scheduled or urgent maintenance activities.
Targeted Surveys	A survey sent to specific individuals and tracked by their email address or unique ID code
Multi-Mode Survey	A survey that is administered through various mechanisms (e.g. online, paper, offline kiosk mode)
Collector	A collector is used to gather responses from different segments of the population in the same survey. Each collector would have a unique survey link and then responses can be viewed and analyzed by each collector/segment or in aggregate.



4.0 REQUIREMENTS

4.1 Tool Specifications

The online survey tool must:

- 4.1.1 meet Web Content Accessibility Guidelines (WCAG) 2.0 at the AA level;
- 4.1.2 be a secure reliable hosted service: the current version of this service, as well as any future updates, versions, and patches, must protect against;
 - 4.1.2.1 upload file exploits, including but not restricted to Word, PDF, image, audio, and video file types,
 - 4.1.2.2 unauthorized third-party access,
 - 4.1.2.3 viruses,
 - 4.1.2.4 injection attacks including structured query language (SQL) and cross-site scripting (XSS) attacks,
 - 4.1.2.5 denial of service (DoS) attacks, and
 - 4.1.2.6 spamming activities;
- 4.1.3 have at least 99.9% uptime and surveys must be accessible twenty-four hours per day and seven days per week outside of regularly scheduled or urgent maintenance;
- 4.1.4 be hosted using CRA's domain name Uniform Resource Locator (URL) used for conducting online surveys;
- 4.1.5 provide CRA Users with unlimited access to configure and design web-based surveys using the tool's interface (in accordance with the CRA User Account Types defined in Section 3.2 below). This includes editing capabilities and the ability to program the look and design of elements within the surveys;
- 4.1.6 provide English and French interfaces;
- 4.1.7 collect and store all Content for the duration of the contract;
- 4.1.8 include safeguards which ensure that no person or entity will have access to any Content (i.e. survey response data, survey questionnaires and contact information) stored in the tool without the express permission of, or access provision by, the CRA;
- 4.1.9 allow CRA Users to deploy anonymous and Targeted Surveys;
- 4.1.10 be accessible to CRA Users and Survey Respondents through Windows 10 operating system using the Microsoft Edge Internet Browser;
- 4.1.11 backup all Content, including both survey construction and survey response data;
- 4.1.12 ensure that Survey Respondents and CRA Users browser access to the Tool is via Hypertext Transfer Protocol Secure (HTTPS) and that a minimum of Transport Layer Security (TLS) 1.2 may be enforced by the service.

4.2 Survey Tool Account

The Contractor must provide fifteen (15) unique user name and password-protected accounts with tiered levels of access that allows for the creation of CRA-branded public opinion surveys as well as analytical and reporting capabilities. The online survey tool must provide a user management system and administration control panel that allows the Administration Accounts to manage the following CRA User Account Types within the tool:



CRA User Account Type	Description	Quantity
Administration Accounts	<ul style="list-style-type: none"> • Administration Accounts must have full user based administration rights and be able to perform all functions listed in the Statement of Requirement. Only Administration Accounts will have access to all Content generated in the tool; • Ability to design and create surveys as well as conduct analytics and produce reports; • Ability to assign the different account types (design and reporting) to the CRA Users, • Ability to control functionality privileges; • Ability to assign reporting privileges to the reporting accounts and restrict access on a project by project basis; • Ability to assign design and reporting privileges to the design accounts on a project by project basis. 	6
Design Accounts	<ul style="list-style-type: none"> • Ability to create and design surveys; • Ability to produce reports and conduct analysis; • No access to the Administration Account projects; • Only have access to surveys they have created; • Only have access to reports they have created; 	4
Reporting Accounts	<ul style="list-style-type: none"> • restricted access to just reporting and analytics functions. • not able to design or create surveys and would only have access to the data. • no design functionality but must have full reporting and access to the analytics functions. 	5

The term ‘CRA Users’ is used throughout the document to refer to all CRA User Account Types; however, the access and functionalities specified within this document must be constrained in accordance with the table above.

4.3 Survey Tool Design

The online survey tool must:

- 4.3.1 include a user friendly interface to design surveys, that does not require coding or a programming language to configure or design a survey (e.g. click, drag and drop, graphical user interface);
- 4.3.2 allow CRA Users to move and copy questions within a survey;
- 4.3.3 allow CRA Users to batch edit (replace, delete, and copy) by page, or multiple questions or sections;
- 4.3.4 include Response Validation options for checkbox and multiple choice questions (e.g. max of 3 choices, exclusive choices);
- 4.3.5 allow CRA Users to randomize survey questions and pages;
- 4.3.6 allow CRA Users to live preview and test survey prior to deployment;



- 4.3.7 be Mobile Device and Smartphone Friendly for Survey Respondents;
- 4.3.8 support anonymous response options;
- 4.3.9 allow CRA Users to access CSS Stylesheet (if not all formatting features are available through the drag and drop interface);
- 4.3.10 allow CRA Users to create an unlimited number of surveys;
- 4.3.11 allow CRA Users to conduct up to 500 surveys per year with up to 250 questions and unlimited responses per survey
- 4.3.12 support a minimum of 200 live surveys simultaneously;
- 4.3.13 allow for a minimum of 100,000 responses per survey;
- 4.3.14 allow Survey Respondents to switch languages, at any point while responding to a survey, without the loss of responses;
- 4.3.15 provide a contact management system which allows CRA Users to import contacts (single/groups/lists), assign contacts to surveys and track Survey Respondents.

4.4 Survey Logic

The online survey tool must:

- 4.4.1 provide multi-conditional Branching capabilities for CRA users;
- 4.4.2 provide Piping capabilities for CRA Users;
- 4.4.3 allow CRA Users to show/hide questions on same page and different pages;
- 4.4.4 allow CRA Users to show/hide question choices;
- 4.4.5 be able to support question based quotas;
- 4.4.6 be able to support advanced skip logic, including:
 - unconditional skipping;
 - skip to a random page;
 - skip to a question;
 - skip to a page;
 - conditional Branching;
 - skip to a page based on answers to previous questions;
- 4.4.7 be able to re-direct Survey Respondents' browser to a specific web page/URL upon completion;
- 4.4.8 allow CRA Users to randomize variables;
- 4.4.9 provide a scoring survey, where points are assigned to responses;
- 4.4.10 allow CRA Users to hide a page;
- 4.4.11 allow CRA Users to disable questions;
- 4.4.12 allow CRA Users to disable question choices.



4.5 Survey Question Type

The online survey tool must allow CRA Users to:

- 4.5.1** create a library of standardized questions and responses/question templates;
- 4.5.2** create the following question types:
 - 4.5.2.1** Drill down;
 - 4.5.2.2** Ranking questions;
 - 4.5.2.3** matrix question;
 - 4.5.2.4** Checkbox grid;
 - 4.5.2.5** Date/time question;
 - 4.5.2.6** Dropdown grid;
 - 4.5.2.7** Multiple choice grid;
 - 4.5.2.8** Text response grid;
 - 4.5.2.9** Check box (multiple answer questions);
 - 4.5.2.10** Dropdown questions;
 - 4.5.2.11** Multiple choice;
 - 4.5.2.12** Open text response options (short text/single line and multiple-line) with functionality for administrator to set a maximum word limit;
 - 4.5.2.13** Yes/No;
 - 4.5.2.14** Text/section headings.

4.6 Survey Question Display and Functionality

The online survey tool must allow CRA Users to:

- 4.6.1** create & save bulk import lists of response choices;
- 4.6.2** randomize the order of questions;
- 4.6.3** add choices in bulk;
- 4.6.4** randomize question choices;
- 4.6.5** alphabetize choices;
- 4.6.6** validate text/input responses (for example: telephone number, postal code);
- 4.6.7** format & style text (WYSIWYG);
- 4.6.8** insert images, graphics & videos;
- 4.6.9** add "Other" text box;
- 4.6.10** add question identifiers;
- 4.6.11** make responses to questions optional or required.



4.7 Survey Creation

The online survey tool must:

- 4.7.1 be able to create Intercepts for Pop up surveys;
- 4.7.2 allow Survey Respondents to save and continue later (without cookies) when participating in surveys;
- 4.7.3 allow Survey Respondents to start survey in any language (French or English);
- 4.7.4 allow CRA Users to password protect surveys;
- 4.7.5 allow CRA Users to create personalized URL's for each survey with unique English and French URLs;
- 4.7.6 allow CRA Users to create survey access restrictions (i.e. session, IP, Cookies, email invites only, once per computer, once per location);
- 4.7.7 allow CRA Users to toggle surveys between live & not live (active/inactive) without the loss of data;
- 4.7.8 allow CRA Users to create anonymous or Targeted Surveys;
- 4.7.9 allow CRA Users to download and/or print responses;
- 4.7.10 allow CRA Users to edit page messages that participants receive during or at the end of the survey as well as messages the participants see when the survey is closed or inactive;
- 4.7.11 allow CRA Users to edit button text;
- 4.7.12 allow CRA Users to edit error messages;
- 4.7.13 have survey quota management.

4.8 Data Collection

The online survey tool must allow CRA Users to:

- 4.8.1 add responses to datasets that have been gathered offline for Multi-Mode Surveys;
- 4.8.2 create multiple Collectors (data segmentation) for the same survey and each Collector should have a unique link for each language;
- 4.8.3 send out surveys through virus-free email invite links;
- 4.8.4 personalize and format email messages;
- 4.8.5 send test emails;
- 4.8.6 send targeted reminder emails (i.e. CRA Users can specify that emails are only sent to those who have not yet responded);
- 4.8.7 add contacts individually or by importing entire bulk contact lists;
- 4.8.8 upload and store a minimum of 250,000 contacts.
- 4.8.9 save contact lists;
- 4.8.10 view status of emails sent (in real time) (e.g. bounce backs, failed messages, viewed);
- 4.8.11 view status of participation (viewed survey, in progress, submitted);
- 4.8.12 configure the "From/Reply-To" email address and "From" name;
- 4.8.13 merge address book fields into email Invite;
- 4.8.14 create personalized fields in email invitations and merging profile information for personalized messages and invites (i.e. custom fields);



- 4.8.15** provide an “opt out” response option for future invitations on emails. Survey tool must automatically manage opt out responses to prevent future invitations from being sent to individuals who have chosen this option. The unsubscribe/opt-out message must be available in both official languages.

4.9 Analytics

The online survey tool must:

- 4.9.1** display tabular and graphical results in real time (as responses are collected);
- 4.9.2** display summary statistics (including daily tracking and completion time);
- 4.9.3** display and print individual responses;
- 4.9.4** allow CRA Users to delete individual responses;
- 4.9.5** allow CRA Users to delete responses in bulk;
- 4.9.6** allow CRA Users to edit responses (for recoding purposes or data cleanup);
- 4.9.7** provide drop-out analytics;
- 4.9.8** provide a single dataset for bilingual surveys (same dataset regardless of language the survey was completed in).

4.10 Reporting

The online survey tool must allow CRA Users to:

- 4.10.1** generate and display basic summary reports with tabulated data – Summary reports would include the frequencies and percentages of the responses to all questions.
- 4.10.2** generate and display printable and saveable customized topline reports (with charts, graphs, summary tables, cross-tabs) with multiple conditions (example, filtered by completion status or a demographic question);
- 4.10.3** modify, generate and display different chart & graph types (e.g. pie, bar);
- 4.10.4** generate and display basic summary statistics (counts, frequencies, percentages, response rate or participation rate, # of completes);
- 4.10.5** generate and display individual response reports (per submission);
- 4.10.6** perform cross-tabulations.

4.11 Data Export

The online survey tool must have the following Data Export functionalities:

- 4.11.1** Survey response coding and exporting to SPSS;
- 4.11.2** Export raw data to MS Excel;
- 4.11.3** Tab delimited to CSV;
- 4.11.4** Export reports to one (or more) of the following: MS Word, MS Excel;
- 4.11.5** Export survey to one (or more) of the following: MS Word, MS Excel;
- 4.11.6** Export invite list to CSV.



4.12 Content Ownership

CRA will have full ownership of all Content stored in the tool.

5.0 TASKS

5.1 General Tasks

The Contractor must:

- 5.1.1** provide CRA with the fifteen (15) user names and passwords;
- 5.1.2** notify the Project Authority (PA) in which national jurisdictions the solution Content is potentially stored, processed, and transmitted;
- 5.1.3** provide a minimum of 48-hours notification to the PA for any scheduled downtime. Planned maintenance activities must occur outside of regular Business Days and Business Hours (6:00 AM to 8:00 PM Eastern Time, Monday to Friday);
- 5.1.4** provide a minimum of one hour notification to the PA of any unplanned outages occurring;
- 5.1.5** securely remove and destroy all Content from the tool at the conclusion of the contract and/or at the request of the CRA. The secure destruction of the data must be conducted to prevent recovery. The Contractor must provide the PA with a certificate of destruction each time any data is destroyed (at the end of the contract or upon request by the CRA).

5.2 Training Services

The Contractor must:

- 5.2.1** provide two full days of live in-person or online training (equivalent to 15 hours) during the first year of the contract covering the full capabilities of the tool.
 - 5.2.1.1** The Contractor must also provide one day of live training annually for each subsequent year of the contract covering the same topics;
 - 5.2.1.2** Training must be provided in English at no additional cost to CRA;
- 5.2.2** provide training aids and self-learning resources (online help, online manuals, tutorials) in both English and French.

5.3 User Support Services

The Contractor must:

- 5.3.1** attend meetings with the PA and CRA Users, which will be held in Ottawa, ON. Meetings can take place by teleconference or videoconference if attendance in-person would result in travel costs to Ottawa.
- 5.3.2** meet with the PA and other CRA Users both prior to training and following full launch, as follows:



Meeting 1: Initial Setup

The Contractor must define requirements for personalized branding, user account creation and user management of entire system. Discussing timelines for training and the date the tool will be ready for full use.

Meeting 1 will likely be 2-3 hours in length.

Meeting 2: Technical Issue Review

The Contractor and the CRA Users will discuss any outstanding issues, including timelines for resolution, and answer any questions related to the tool.

Meeting 2 will likely be 2-3 hours in length.

Meeting 3: Final review of the tool

The Contractor must provide a final overview of the tool and demonstrate that all outstanding issues have been resolved and the tool is ready for deployment.

Meeting 3 will likely be 2 hours in length.

5.4 Technical Support Services

The Contractor must provide ongoing technical support services to CRA Users to resolve technical issues and ensure continued Reliability of the tool as follows:

5.4.1 Help Desk

CRA Users must be able to either call a toll-free telephone number or email for support if encountering any difficulties with the tool. If contacting the help desk via email, the user shall receive a notification or acknowledgement within 24 hours that the request has been received. At least 80% of issues must be resolved within 48 hrs of acknowledgement.

5.4.2 Urgent Issues Reporting

CRA Users must have a mechanism to report urgent issues (e.g. problems arising the day of the launch of a survey) and they must be addressed within 24 hours.

5.5 Template Requirements and Updates

5.5.1 The Contractor must create a customized template with the GC/CRA brand (using the Web Experience Toolkit (WET) template to be applied in CRA User's survey design and configuration;

5.5.2 The template will be subject to annual review and must be updated if necessary to meet CRA/GC Standards.



Annex B - Basis of Payment

The Contractor will be paid a firm all-inclusive annual rate per user, as specified below, DDP (Canada). Customs duties are included, and Applicable Taxes are extra.

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

Table 1: Firm Contract Period

Description	Firm All-Inclusive Annual Rate Per User	Number of Users	Total Price
Access to Online Survey Tool	TBD	15	TBD

Table 2: Option Year Pricing

Description	Option Year 1	Option Year 2	Option Year 3	Option Year 4
Firm All-Inclusive Annual Rate Per User	TBD	TBD	TBD	TBD