



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

Public Health Agency of Canada / Agence de la santé publique du Canada

**Attn:** Erin Massey  
**Email:** erin.massey@canada.ca

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

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

**Proposition à:**  
**Agence de la santé publique du Canada**  
Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexées, au(x) prix indiqué(s).

**Instructions : See Herein**  
**Instructions: Voir aux présentes**

**Issuing Office – Bureau de distribution**  
Public Health Agency of Canada / Agence de la santé publique du Canada  
200, Eglantine Driveway  
Tunney's Pasture  
Ottawa Ontario K1A 0K9

<b>Title – Sujet</b> Hospital-based surveillance of influenza and routine monitoring of seasonal influenza vaccine effectiveness (VE)	
<b>Solicitation No. – N° de l'invitation</b> 1000218962	<b>Date</b> 2020-05-20
<b>Solicitation Closes at 2 :00PM on 2020-06-09</b>	<b>Time Zone Fuseau horaire</b> EDT
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à :</b> Name: Erin Massey Email: erin.massey@canada.ca Telephone – téléphone : 613-941-2094	
<b>Destination – of Goods, Services, and Construction:</b> <b>Destination – des biens, services et construction :</b> See Herein – Voir ici	
<b>Delivery required - Livraison exigée</b> See Herein – Voir ici	
<b>Vendor/firm Name and address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Facsimile No. – N° de télécopieur :</b> <b>Telephone No. – N° de téléphone :</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur</b>	
<hr/> <b>(type or print)/ (taper ou écrire en caractères d'imprimerie)</b>	
<hr/> <b>Signature</b>	<hr/> <b>Date</b>

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## **PART 1 - GENERAL INFORMATION**

### **1.1 Security Requirements**

1. At the date of bid closing, the following conditions must be met:
  - (a) the Bidder must hold a valid organization security clearance as indicated in Part 6 - Resulting Contract Clauses;
  - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 6 - Resulting Contract Clauses;
  - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
2. For additional information on security requirements, Bidders should refer to the [Contract Security Program of Public Works and Government Services Canada \(http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html\)](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) website.

### **1.2 Statement of Work**

The Work to be performed is detailed under Annex A, Statement of Work.

### **1.3 Debriefings**

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

## **PART 2 - BIDDER INSTRUCTIONS**

### **2.1 Standard Instructions, Clauses and Conditions**

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

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

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

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

Delete: 60 days

Insert: 90 days

### **2.2 Submission of Bids**

Bids must be submitted only to the Contracting Authority by email, by the date and time indicated on page 1 of the bid solicitation.

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

### **2.3 Former Public Servant**

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

#### **Definitions**

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

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

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

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

#### **Former Public Servant in Receipt of a Pension**

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

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

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

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

#### **Work Force Adjustment Directive**

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

If so, the Bidder must provide the following information:

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

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

#### **2.4 Enquiries - Bid Solicitation**

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

#### **2.5 Applicable Laws**

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

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

### **PART 3 - BID PREPARATION INSTRUCTIONS**

#### **3.1 Bid Preparation Instructions**

Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid: One electronic copy by email;  
Section II: Financial Bid: One electronic copy by email;  
Section III: Certifications: One electronic copy by email.

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

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

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

- (a) use a numbering system that corresponds to the bid solicitation.

#### **Section I: Technical Bid**

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

#### **Section II: Financial Bid**

Bidders must submit their financial bid in accordance with the Basis of Payment.

#### **Section III: Certifications**

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

## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 Evaluation Procedures

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

#### 4.1.1 Technical Evaluation

##### 4.1.1.1 Mandatory Technical Criteria

#### 1. General Instructions

For the purposes of this evaluation,

1. Bidders may use the attached evaluation grid below to reference supporting documentation, including but not limited to CVs with detailed descriptions of tasks/activities performed, Diplomas, and/or Degrees, which clearly demonstrates compliance with each of the stated mandatory and rated criteria. For educational requirements for a particular degree, designation or certificate, PHAC will only consider educational programs that were successfully completed by the resource by the time of bid closing. If the degree, designation or certification was issued by an educational institution outside of Canada, the Bidder must provide a copy of the results of the academic credential assessment and qualification recognition service issued by an agency or organization recognized by the Canadian Information Centre for International Credentials (CICIC).
2. For any requirements that specify a particular time period (e.g., 2 years) of work experience, the evaluation team evaluating bids on behalf of Canada will disregard any information about experience if the technical bid does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). The evaluation team will evaluate only the duration that the resource actually worked on a project or projects (from his or her start date to end date), instead of the overall start and end date of a project or a combination of projects in which a resource has participated.
3. The following rating scheme will be used to evaluate Rated Requirements R5 "Proposed Work Plan".

Rating	Description
100%	Outstanding response; the rated area is fully met or exceeded; rigorous approach and methodology that meets all of the elements of the rated area. The Bidder receives 100% of the available points for this area.
75%	Response to the rated area is well addressed; good approach and methodology or missing minor elements. The Bidder receives 75% of the available points for this area.
50%	Response to the rated criteria is less than satisfactorily addressed; adequate approach and methodology or missing many points including some major elements. The Bidder receives 50% of the available points for this area.
25%	Unsatisfactory response; the approach and methodology are weak or missing many major elements. The Bidder receives 25% of the available points for this area.
0%	The rated area is not addressed. The Bidder receives 0% of the available points for this area.

**2. Mandatory Technical Criteria**

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

Bids which fail to meet the Mandatory Requirements will be deemed non-responsive and given no further consideration.

<b>Mandatory Technical Criteria</b>		
<b>Number</b>	<b>Corporate Mandatory Technical Criterion</b>	<b>Bidder's Response</b>
<b>M1</b>	<p>The Bidder must identify and reference 1 project where the Bidder was responsible for implementing and managing a surveillance program. To be accepted the project reference must address each of the following criteria:</p> <ul style="list-style-type: none"> <li>• A minimum of 3 resources were required to deliver the work;</li> <li>• A minimum annual budget of \$350K; and,</li> <li>• A minimum project duration of 24 months within the last 10 years of bid solicitation closing.</li> </ul>	
<b>Number</b>	<b>Resource Mandatory Technical Criterion</b>	<b>Bidder's Response</b>
<b>M2</b>	<p><b>Principal Investigator Mandatory Criteria</b></p> <p>The resource proposed as the Principal Investigator for the Project must:</p> <p>a) Be a Physician currently certified by either a Canadian or American certifying authority or hold a PHD in epidemiology, immunization or public health (proof of credentials required);</p> <p>b) Have a minimum of three years of experience in the last ten years* from bid closing, at least 1 of those 3 years leading, one or more health surveillance project that each involve three or more sentinel sites that are located in three or more different provinces and territories in Canada; and</p> <p>c) Have written a minimum of three peer-reviewed journal publications or reports in the last ten years* from bid closing on a topic related to influenza epidemiology. For each article listed, the Bidder must provide at a minimum:</p> <p>A) Author;            B) Publication;            C) Date of Publication;            D) Title of article;            E) Brief summary of the article (e.g. article abstract);            F) Impact factor of the publication.</p>	



<b>Mandatory Technical Criteria</b>		
	* Work experience, must include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date).	

### **3. Point Rated Technical Criteria**

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below. Bids which fail to obtain the required minimum number of points specified will be declared non-responsive. Each point rated technical criterion should be addressed separately. In cases where more than one resource is bid for a resource category each resource will be evaluated separately against the specific criteria and an average of the scores will be used for evaluation purposes.

<b>Number</b>	<b>Corporate Rated Technical Criteria</b>	<b>Points allocated for the criteria</b>	<b>Bidder's Response</b>
<b>R1</b>	<p><b>Surveillance Service Experience</b></p> <p>The Bidder should demonstrate its experience implementing and managing a health surveillance data network for either the private or public sector in the last ten years from bid closing. The Bidder should describe at minimum:</p> <ul style="list-style-type: none"> <li>• Network Name</li> <li>• Network Partners</li> <li>• Network Purpose and Objectives</li> <li>• Network Outputs</li> <li>• Bidder's roles and responsibilities</li> </ul> <p>Points Allocation:</p> <p>Two points will be awarded for each reference project up to a maximum of ten points. The bidder should provide project references completed under the same data network described in R1.</p>	10	
<b>R2</b>	<p><b>Principal Investigator – Teaching Experience</b></p> <p>The resource proposed as the Principal Investigator should be a subject matter expert in the area of vaccine effectiveness as measured by their experience teaching on vaccines in a graduate level course at a Canadian or American university in the last ten years* from bid closing.</p> <p>Points Allocation:</p> <p>Two points will be awarded for each graduate level course taught to a maximum of ten points. Details on the course, the institution in which it was provided, the dates of delivery and how it meets the criteria should be provided for any points to be assigned.</p>	10	

Number	Corporate Rated Technical Criteria	Points allocated for the criteria	Bidder's Response
R3	<p><b>Principal Investigator – Impact Factor</b></p> <p>The resource proposed as the Principal Investigator should be a subject matter expert in the area of influenza epidemiology as defined by the impact factor of the articles identified in Mandatory Criteria M2c) as measured by CiteFactor, <a href="http://www.citefactor.org/">http://www.citefactor.org/</a></p> <p><b>Points Allocation:</b>  Of the three (3) articles identified for M1c), the article with the highest impact factor will be evaluated based on the following:  If 5 or more = 10 points  If 2.5-4.99 = 5 points  &lt;2.5 = 0 points</p>	10	
R4	<p><b>Principal Investigator - Experience negotiating with Canadian Provincial or Territorial Health Government Organizations for access to health related data</b></p> <p>The resource proposed as the Principal Investigator should have experience with the successful negotiation with Canadian Provincial or Territorial Health Government Organizations for access to health related data.</p> <p>The Bidder should describe the experience by providing:</p> <p>Project Name  Background  Bidder's roles and responsibilities  A copy of data access or data share agreement</p> <p><b>Points Allocation:</b>  Two points will be awarded for each project or initiative in which they have experience with the successful negotiation with Canadian Provincial or Territorial Health Organizations for access to health related data to a maximum overall of 10 points.</p>	10	
R5	<p><b>Proposed Work Plan</b></p> <p>The Bidder should clearly outline in detail its proposed Work Plan to meet the requirements outlined in the Statement of Work (SOW). The proposed Work Plan should include the major activities of all personnel assigned to each task including Principal Investigator oversight, and the proposed schedule for completion or delivery in relation to the requirements of the SOW. Sufficient detail should be provided to demonstrate the Bidder's grasp of the requirement and the Bidder's competence to meet it. The Bidder should state any major risks and propose mitigation strategies.</p> <p><b>Points Allocation:</b>  Points will be allocated as follows:</p>		

Number	Corporate Rated Technical Criteria	Points allocated for the criteria	Bidder's Response
	<p><b>Phase 1: Network Establishment/Adaptation</b> (SOW section 3.1 Phase 1)</p> <ul style="list-style-type: none"> <li>• Proposed method of establishing or adapting the network in order to meet all surveillance infrastructure requirements</li> </ul> <p><b>Phase 2: Influenza Surveillance and Vaccine Effectiveness (VE) Monitoring Protocol</b> (SOW section 3.1 Phase 2)</p> <ul style="list-style-type: none"> <li>• As the protocol will not be submitted until after the contract award, this phase of the work is not subject to evaluation for the bidding process.</li> </ul> <p><b>Phase 3: Routine Influenza Surveillance</b> (SOW section 3.1 Phase 3)</p> <ul style="list-style-type: none"> <li>• Proposed method of case identification and verification</li> <li>• Proposed method of data collection and reporting for case, laboratory and admissions data</li> <li>• Proposed method of data management</li> </ul> <p><b>Phase 4: Vaccine Effectiveness Monitoring</b> (SOW section 3.1 Phase 4)</p> <ul style="list-style-type: none"> <li>• Proposed method of study subject selection.</li> <li>• Proposed method of ascertainment of: <ul style="list-style-type: none"> <li>A) Vaccination status; and</li> <li>B) Specimen testing results.</li> </ul> </li> <li>• Proposed method of data flow through all levels of reporting.</li> <li>• Proposed method of data management.</li> <li>• Proposed analytic approach.</li> </ul>	<p>15</p> <p>N/A</p> <p>5</p> <p>5</p> <p>5</p> <p>5</p> <p>5</p> <p>5</p> <p>5</p>	
	Minimum overall points required to be deemed responsive	60	
	Total available points	100	

**4.2 Basis of Selection – Highest Combined Rating of Technical Merit (70%) and Price (30%)**

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 60 points overall for the technical evaluation criteria which are subject to point rating.  
The rating is performed on a scale of 100 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 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 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

<b>Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)</b>			
	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>	115/135	89/135	92/135
<b>Bid Evaluated Price</b>	\$55,000.00	\$50,000.00	\$45,000.00
<b>Calculations</b>	<b>Technical Merit Score</b>	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$
	<b>Pricing Score</b>	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$
<b>Combined Rating</b>	83.84	75.56	80.89
<b>Overall Rating</b>	1st	3rd	2nd

## **PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION**

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

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

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

### **5.1 Certifications Required with the Bid**

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

#### **5.1.1 Integrity Provisions - Declaration of Convicted Offences**

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

#### **5.2 Certifications Precedent to Contract Award and Additional Information**

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

##### **5.2.1 Integrity Provisions – Required Documentation**

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

##### **5.2.2 Additional Certifications Precedent to Contract Award**

###### **5.2.2.1 Federal Contractors Program for Employment Equity - Bid Certification**

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

#### **5.2.2.2 Status and Availability of Resources**

[A3005T](#) (2010-08-16), Status and Availability of Resources

#### **5.2.2.3 Education and Experience**

[A3010T](#) (2010-08-16), Education and Experience

## **PART 6 - RESULTING CONTRACT CLAUSES**

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

### **6.1 Security Requirements**

**6.1.1** There is no security requirement applicable to the Contract.

Unscreened contractors must be escorted by an employee or Commissionaire at all times when visiting Government of Canada facilities.

Information which is to be used in the development of the contracted product, as reference material or otherwise made available to the contractor must be unclassified material and considered to be releasable to the public by Health Canada/Public Health Agency of Canada and/or The Government of Canada.

No Protected or Classified information is to be made available to the contractor, used in the production of the contracted product, or produced as a result of this contract.

### **6.2 Statement of Work**

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

### **6.3 Standard Clauses and Conditions**

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

#### **6.3.1 General Conditions**

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

#### **6.3.2 Supplemental General Conditions**

[4006](#) (2010-08-16), Contractor to Own Intellectual Property Rights if Foreground Information

[4008](#) (2008-12-12), Personal Information

#### **4008 01 (2008-05-12) Interpretation**

1. In the Contract, unless the context otherwise requires,

"General Conditions"  
means the general conditions that form part of the Contract;

"Personal Information"  
means information about an individual, including the types of information specifically described in the *Privacy Act*, R.S. 1985, c. P-21;

"Record"  
means any hard copy document or any data in a machine-readable format containing Personal Information;

2. Words and expressions defined in the General Conditions and used in these supplemental general conditions have the meanings given to them in the General Conditions.
3. If there is any inconsistency between the General Conditions and these supplemental general conditions, the applicable provisions of these supplemental general conditions prevail.

#### **4008 02 (2008-05-12) Ownership of Personal Information and Records**

To perform the Work, the Contractor will be provided with and/or will be collecting Personal Information from third parties. The Contractor acknowledges that it has no rights in the Personal Information or the Records and that Canada owns the Records. On request, the Contractor must make all the Personal Information and Records available to Canada immediately in a format acceptable to Canada.

#### **4008 03 (2008-05-12) Use of Personal Information**

The Contractor agrees to create, collect, receive, manage, access, use, retain, and dispose of the Personal Information and the Records only to perform the Work in accordance with the Contract.

#### **4008 04 (2008-05-12) Collection of Personal Information**

1. If the Contractor must collect Personal Information from a third party to perform the Work, the Contractor must only collect Personal Information that is required to perform the Work. The Contractor must collect the Personal Information from the individual to whom it relates and the Contractor must inform that individual (at or before the time when it collects the Personal Information) of the following:
  - a. that the Personal Information is being collected on behalf of, and will be provided to, Canada;
  - b. the ways the Personal Information will be used;
  - c. that the disclosure of the Personal Information is voluntary or, if there is a legal requirement to disclose the Personal Information, the basis of that legal requirement;
  - d. the consequences, if any, of refusing to provide the information;
  - e. that the individual has a right to access and correct his or her own Personal Information; and
  - f. that the Personal Information will form part of a specific personal information bank (within the meaning of the *Privacy Act*), and also provide the individual with information about which government institution controls that personal information bank, if the Contracting Authority has provided this information to the Contractor.
2. The Contractor, its subcontractors, and their respective employees must identify themselves to the individuals from whom they are collecting Personal Information and must provide those individuals with a way to verify that they are authorized to collect the Personal Information under a Contract with Canada.

#### **4008 05 (2008-05-12) Maintaining the Accuracy, Privacy and Integrity of Personal Information**

The Contractor must ensure that the Personal Information is as accurate, complete, and up to date as possible. The Contractor must protect the privacy of the Personal Information. To do so, at a minimum, the Contractor must:

- a. not use any personal identifiers (e.g., social insurance number) to link multiple databases containing Personal Information;
- b. segregate all Records from the Contractor's own information and records;
- c. restrict access to the Personal Information and the Records to people who require access to perform the Work (for example, by using passwords or biometric access controls);
- d. provide training to anyone to whom the Contractor will provide access to the Personal Information regarding the obligation to keep it confidential and use it only to perform the Work. The Contractor must provide this training before giving an individual access to any Personal Information and the Contractor must keep a record of the training and make it available to the Contracting Authority if requested;
- e. if requested by the Contracting Authority, before providing anyone with access to the Personal Information, require anyone to whom the Contractor provides access to the Personal Information to acknowledge in writing (in a form approved by the Contracting Authority) their responsibilities to maintain the privacy of the Personal Information;
- f. keep a record of all requests made by an individual to review his or her Personal Information, and any requests to correct errors or omissions in the Personal Information (whether those requests are made directly by an individual or by Canada on behalf of an individual);



- g. include a notation on any Record(s) that an individual has requested be corrected if the Contractor has decided not to make the correction for any reason. Whenever this occurs, the Contractor must immediately advise the Contracting Authority of the details of the requested correction and the reasons for the Contractor's decision not to make it. If directed by the Contracting Authority to make the correction, the Contractor must do so;
- h. keep a record of the date and source of the last update to each Record;
- i. maintain an audit log that electronically records all instances of and attempts to access Records stored electronically. The audit log must be in a format that can be reviewed by the Contractor and Canada at any time; and
- j. secure and control access to any hard copy Records.

#### **4008 06 (2008-05-12) Safeguarding Personal Information**

The Contractor must safeguard the Personal Information at all times by taking all measures reasonably necessary to secure it and protect its integrity and confidentiality. To do so, at a minimum, the Contractor must:

- a. store the Personal Information electronically so that a password (or a similar access control mechanism, such as biometric access) is required to access the system or database in which the Personal Information is stored;
- b. ensure that passwords or other access controls are provided only to individuals who require access to the Personal Information to perform the Work;
- c. not outsource the electronic storage of Personal Information to a third party (including an affiliate) unless the Contracting Authority has first consented in writing;
- d. safeguard any database or computer system on which the Personal Information is stored from external access using methods that are generally used, from time to time, by prudent public and private sector organizations in Canada in order to protect highly secure or sensitive information;
- e. maintain a secure back-up copy of all Records, updated at least weekly;
- f. implement any reasonable security or protection measures requested by Canada from time to time; and
- g. notify the Contracting Authority immediately of any security breaches; for example, any time an unauthorized individual accesses any Personal Information.

#### **4008 07 (2008-05-12) Appointment of Privacy Officer**

The Contractor must appoint someone to be its privacy officer and to act as its representative for all matters related to the Personal Information and the Records. The Contractor must provide that person's name to the Contracting Authority within ten (10) days of the award of the Contract.

#### **4008 08 (2008-05-12) Quarterly Reporting Obligations**

Within thirty (30) calendar days of the end of each quarter (January-March; April-June; July-September; October- December), the Contractor must submit the following to the Contracting Authority:

- a. a description of any new measures taken by the Contractor to protect the Personal Information (for example, new software or access controls being used by the Contractor);
- b. a list of any corrections made to Personal Information at the request of an individual (including the name of the individual, the date of the request, and the correction made);
- c. details of any complaints received from individuals about the way in which their Personal Information is being collected or handled by the Contractor; and
- d. a complete copy (in an electronic format agreed to by the Contracting Authority and the Contractor) of all the Personal Information stored electronically by the Contractor.

#### **4008 09 (2008-05-12) Threat and Risk Assessment**

Within ninety (90) calendar days of the award of the Contract and, if the Contract lasts longer than one year, within thirty (30) calendar days of each anniversary date of the Contract, the Contractor must submit to the Contracting Authority a threat and risk assessment, which must include:

- a. a copy of the current version of any request for consent form or script being used by the Contractor to collect Personal Information;
- b. a list of the types of Personal Information used by the Contractor in connection with the Work;
- c. a list of all locations where hard copies of Personal Information are stored;

- d. a list of all locations where Personal Information in machine-readable format is stored (for example, the location where any server housing a database including any Personal Information is located), including back-ups;
- e. a list of every person to whom the Contractor has granted access to the Personal Information or the Records;
- f. a list of all measures being taken by the Contractor to protect the Personal Information and the Records;
- g. a detailed explanation of any potential or actual threats to the Personal Information or any Record, together with an assessment of the risks created by these threats and the adequacy of existing safeguards to prevent these risks; and
- h. an explanation of any new measures the Contractor intends to implement to safeguard the Personal Information and the Records.

#### **4008 10 (2008-05-12) Audit**

Canada may audit the Contractor's compliance with these supplemental general conditions at any time. If requested by the Contracting Authority, the Contractor must provide Canada (or Canada's authorized representative) with access to its premises and to the Personal Information and Records at all reasonable times. If Canada identifies any deficiencies during an audit, the Contractor must immediately correct the deficiencies at its own expense.

#### **4008 11 (2008-05-12) Statutory Obligations**

1. The Contractor acknowledges that Canada is required to handle the Personal Information and the Records in accordance with the provisions of Canada's *Privacy Act*, *Access to Information Act*, R.S. 1985, c. A-1, and *Library and Archives of Canada Act*, S.C. 2004, c. 11. The Contractor agrees to comply with any requirement established by the Contracting Authority that is reasonably required to ensure that Canada meets its obligations under these acts and any other legislation in effect from time to time.

2. The Contractor acknowledges that its obligations under the Contract are in addition to any obligations it has under the *Personal Information Protection and Electronic Documents Act*, S.C. 2000, c. 5, or similar legislation in effect from time to time in any province or territory of Canada. If the Contractor believes that any obligations in the Contract prevent it from meeting its obligations under any of these laws, the Contractor must immediately notify the Contracting Authority of the specific provision of the Contract and the specific obligation under the law with which the Contractor believes it conflicts.

#### **4008 12 (2008-05-12) Disposing of Records and Returning Records to Canada**

The Contractor must not dispose of any Record, except as instructed by the Contracting Authority. On request by the Contracting Authority, or once the Work involving the Personal Information is complete, the Contract is complete, or the Contract is terminated, whichever of these comes first, the Contractor must return all Records (including all copies) to the Contracting Authority.

#### **4008 13 (2008-05-12) Legal Requirement to Disclose Personal Information**

Before disclosing any of the Personal Information pursuant to any applicable legislation, regulation, or an order of any court, tribunal or administrative body with jurisdiction, the Contractor must immediately notify the Contracting Authority, in order to provide the Contracting Authority with an opportunity to participate in any relevant proceedings.

#### **4008 14 (2008-05-12) Complaints**

Canada and the Contractor each agree to notify the other immediately if a complaint is received under the *Access to Information Act* or the *Privacy Act* or other relevant legislation regarding the Personal Information. Each Party agrees to provide any necessary information to the other to assist in responding to the complaint and to inform the other immediately of the outcome of that complaint.

#### **4008 15 (2008-05-12) Exception**

The obligations set out in these supplemental general conditions do not apply to any Personal Information that is already in the public domain, as long as it did not become part of the public domain as a result of

any act or omission of the Contractor or any of its subcontractors, agents, or representatives, or any of their employees.

#### **6.4 Term of Contract**

##### **6.4.1 Period of the Contract**

The period of the Contract is from September 1, 2020 to August 21, 2023 inclusive.

#### **6.5 Authorities**

##### **6.5.1 Contracting Authority**

Name: Erin Massey  
Title: Senior Procurement and Contracting Officer  
Organization: Health Canada and the Public Health Agency of Canada  
Telephone: 613-941-2094  
E-mail address: [erin.massey@canada.ca](mailto:erin.massey@canada.ca)

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

##### **6.5.2 Project Authority (to be identified at contract award)**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
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.

##### **6.5.3 Contractor's Representative (to be identified at contract award)**

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
E-mail address: \_\_\_\_\_

#### **6.6 Proactive Disclosure of Contracts with Former Public Servants**

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

## **6.7 Payment**

### **6.7.1 Basis of Payment - Firm Price, Firm Unit Price(s) or Firm Lot Price(s)**

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm unit price per phase, as specified in Annex B for a cost of \$ \_\_\_\_\_. Customs duties are excluded and Applicable Taxes are extra.

### **6.7.2 Limitation of Price**

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

### **6.7.3 Method of Payment**

[H3010C](#) (2016-01-28), Milestone Payments – Not Subject to Holdback

## **6.8 Invoicing Instructions**

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

Each invoice must be supported by:

- a. a copy of the release document and any other documents as specified in the Contract;
  - b. a copy of the monthly progress report.
2. Invoices must be distributed as follows:
    - a. The original must be forwarded to the Project Authority and [hc.p2p.east.invoices-factures.est.sc@canada.ca](mailto:hc.p2p.east.invoices-factures.est.sc@canada.ca) for certification and payment.

## **6.9 Certifications and Additional Information**

### **6.9.1 Compliance**

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

### **6.9.2 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.

### **6.10 Applicable Laws**

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

## 6.11 Priority of Documents

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

- a) the Articles of Agreement;
- b) the supplemental general conditions 4006 (2010-08-16), Contractor to Own Intellectual Property Rights in Foreground Information;
- c) the supplemental general conditions 4008 (2008-12-12), Personal Information;
- d) the general conditions 2035 (2018-06-21), General Conditions – Higher Complexity - Services;
- e) Annex A, Statement of Work;
- f) Annex B, Basis of Payment;
- g) the Contractor's bid dated \_\_\_\_\_

## 6.12 Insurance

G1005C (2016-01-28), Insurance – No Specific Requirement

## ANNEX A- STATEMENT OF WORK

1. **TITLE:** Hospital-based surveillance of influenza and routine monitoring of seasonal influenza vaccine effectiveness (VE)

### 2. SCOPE

#### 2.1. Introduction

The Centre for Immunization and Respiratory Infectious Diseases (CIRID) is part of the Public Health Agency of Canada (PHAC) Infectious Disease Prevention and Control Branch (IDPCB). CIRID is seeking a stable and reliable data source for hospital-based surveillance of influenza severe outcomes and routine monitoring of the effectiveness of the seasonal influenza vaccine in preventing severe outcomes in adults. The surveillance conducted through this Contract will provide regular, timely, standardized data to the PHAC's FluWatch program and will assist CIRID in meeting national and international surveillance standards for seasonal and pandemic influenza preparedness.

#### 2.2. Objectives of the Requirement

The Contractor must provide professional services that will provide CIRID timely and consistent hospital-based surveillance data that contribute to CIRID's understanding of the incidence, epidemiology, and outcomes of influenza-associated hospitalizations and deaths among Canadian adults as well as the effectiveness of the seasonal influenza vaccine in mitigating severe outcomes of influenza infection.

Surveillance findings will be reported by CIRID each week to PHAC senior management, Federal, Provincial and Territorial influenza surveillance focal points, global influenza surveillance partners in the PAHO and the WHO, and to the public via several thousand subscribers to the FluWatch program's weekly report.

#### 2.3. Background and Specific Scope of the Requirement

CIRID's mandate is to prevent, reduce or eliminate vaccine-preventable and respiratory infectious diseases, to reduce or eliminate the negative impact of emerging and re-emerging respiratory infections and maintain public and professional confidence in vaccination programs in Canada.

FluWatch was established in 1996 as a routine surveillance program to monitor seasonal influenza and is composed of a number of systems that gather information on circulating influenza viruses, influenza-like-illness, laboratory-confirmed cases, and influenza-associated hospitalizations and deaths among Canadians. The FluWatch program currently gathers data each epidemiological week on influenza-associated severe outcomes from three (3) data streams:

- Provincial/territorial aggregate surveillance data on the following influenza-associated severe outcomes: hospital admissions, intensive care unit (ICU) admissions and deaths (since 2009/10);
- Sentinel case-level in-hospital surveillance data on the following influenza-associated severe outcomes in the pediatric population: hospital admissions, intensive care unit (ICU) admissions and deaths and
- Sentinel case-level in-hospital surveillance data on the following influenza-associated severe outcomes in the adult population: hospital admissions, intensive care unit (ICU) admissions and deaths.

The sentinel case-level in-hospital surveillance of influenza-associated severe outcomes among adults has been the least stable data stream of the three data streams outlined above, specifically with respect to data providers (i.e. changes in the data provider) and changes in scope (i.e. geographic representativeness and number of sentinel sites).

Enhanced surveillance of influenza and other respiratory infectious diseases is needed in order to accurately track, plan for, and respond to public health issues, as well as to inform public health policy in Canada. Influenza surveillance data are also collected by the PHAC as part of global commitments to international partners, including the Pan American Health Organization (PAHO) and the World Health Organization (WHO). In addition, investing and maintaining an enhanced severe outcome surveillance system ensures that this platform, which is essential to Canadian pandemic preparedness, is in place and ready for escalation for the next pandemic.

### **3. REQUIREMENTS**

#### **3.1. Tasks, Activities, Deliverables and/or Milestones**

Notwithstanding the definition of "Work" in General Conditions, "Work" shall mean the specific Deliverables listed in Phase 1: System Overview Report and in Tables 1, 2, and 3. "Work" shall not include the activities undertaken to produce the Deliverables, the personal health information obtained from the health institutions use to produce the Deliverables, nor the de-identified case level data that becomes the site's source documentation. Work only includes the derived information pooled across all sentinel sites containing only the data elements specified in Tables 1, 2 and 3 that is sent from the Contractor to PHAC.

#### **Phase 1: Network Adaptation & System Overview**

##### **1. Network Adaptation**

In year one of the Contract, the first phase of the Work will require the Contractor to establish or adapt a network as necessary to meet the following surveillance infrastructure requirements:

- The network must include at least eight sentinel sites with geographical representation across Canada at sites where admissions are sufficient to support influenza surveillance (a minimum of 400 general admission beds and/or 20 ICU beds);

Replacement or deletion of any sites must be agreed by the PHAC.

- The Contractor must report case data outlined in Table 1 to PHAC within one week of laboratory confirmation (Appendix A);

As sentinel sites are incorporated into the network and become operational, the Contractor must report case data and laboratory testing data using a secure method approved by PHAC from these sites as outlined in Table 1 on a weekly basis (including nil reports) from epidemiological week 45 until the PHAC declares inter-seasonal levels have resumed typically mid to late May of each year, on or before epidemiological week 22: weeks of May 24-May 30, 2021 and May 22-May 28, 2022);

- The Contractor must pool data from all sentinel sites into one secure database for reporting all data set deliverables to PHAC.

##### **2. System Overview Report**

Once the network has been adapted to meet the requirements described above, the Contractor must submit to the Project Authority a system overview report to describe the details of the surveillance network. The system overview report must be reviewed and updated on an annual basis and submitted by September 30 each year. The system overview report must include the following information:

###### **a. A description of the Contractor's team as follows:**

- List of all members of the Contractor's team and their respective roles;
- List of all employees, subcontractors, or agents engaged in the Contract who will have access to the datasets delivered for the purpose of the Contract; and,

- Copies of the Contractor's privacy and confidentiality agreements signed by all individuals who will have access to datasets delivered for the purpose of the Contract.

b. A listing of sentinel sites and data for each site as follows:

- Site number (Contractor assigned);
- Hospital location;
- Hospital type;
- Number of beds;
- Number of intensive care unit (ICU) beds;
- Beds excluded from the surveillance and VE monitoring protocol;
- Total number of admissions and discharges within the previous influenza surveillance season for all causes, and all respiratory causes by International Classification of Disease (ICD) code (J00 to J99) (see Appendix B);
- Number of influenza laboratory tests performed in the previous influenza surveillance season; defined as epidemiological week 45 to epidemiological week 22. Specify, where possible, if inpatient, outpatient or both are combined;
- Data sources to be used for surveillance and VE monitoring (including limitations that may hamper data completeness);
- Population estimates for catchment area (i.e. the area from which the sentinel sites' patients are drawn) unless otherwise agreed upon by the Project Authority; This may involve supplying PHAC with a frequency distribution of the forward sortation area (FSA) of inpatients for the previous fiscal, calendar year or Influenza season so that PHAC can derive population estimates for the catchment area using population Census estimates.
- Geographical boundaries of each sentinel site's catchment area for the purpose of population rate calculations and identify any exceptions to identified boundaries and/or associated population base unless otherwise agreed upon by the Project Authority; This may involve supplying PHAC with a frequency distribution of the forward sortation area (FSA) of inpatients for the previous fiscal, calendar year or influenza season so that PHAC can map catchment area boundaries; and
- Agreements in place for the secure transmission of dataset submission to the PHAC.

## **Phase 2: Influenza Surveillance and Vaccine Effectiveness (VE) Monitoring Protocol**

In this phase of the Work, the Contractor must develop, each year by September 30<sup>th</sup>, a protocol that outlines, in detail, the methodology that will be used for both the surveillance and VE monitoring components of the Contract that is approved by the Project Authority. The protocol will include, at a minimum, the influenza surveillance and VE monitoring specifics:

The influenza surveillance component of the protocol will include:

- Case definition;
- Data collection methods (case identification, hospital data sources, extraction and transfer methods, and data collection form);
- Data dictionary including the following information for each variable: Variable name, Variable Definition, Rationale, Content Values (e.g. 'YYYY', '1 to 52', 'Yes, No, Unknown'), and Data Type (e.g. Date, String, Numeric, etc.);
- Limitations of data interpretation from the perspective of national generalizability;
- Data flow by hospital site and overall;
- Data management (e.g. entry, integration, cleaning, quality monitoring, storage, backup and recovery etc.); and
- Roles and responsibilities for each member of the Contractor's team if any change has occurred from the prior year.

The VE monitoring component of the protocol will include:

- Monitoring objectives, design, population, period and timeline;



- Case and control definitions;
- Inclusion and exclusion criteria for cases and controls;
- Definition of vaccination status;
- Vaccination status ascertainment method;
- Risk groups to be examined and definition of each group;
- Sample size calculations;
- Data collection methods (including sources, extraction and transfer methods, and case/ control report form);
- Respiratory specimen details (collection and testing practices by site);
- Laboratory responsible for testing and virus typing and subtyping for each site;
- A description of laboratory testing protocols including how protocol may change over time and rationale for change;
- Data flow through all levels of reporting (i.e. within each hospital site and for the project overall);
- Analytical approach including plan for handling of and reporting on missing data; and
- Project limitations (including power/ precision, selection bias, information bias and considerations for national generalizability).

The influenza surveillance and VE monitoring protocol will be reviewed on an annual basis and updated if needed, as decided by the Project Authority.

### **Phase 3: Routine Influenza Surveillance**

During this phase of the Contract, the focus is the ongoing identification of cases and collection of case data and laboratory testing data for weekly reporting. The surveillance data required for this phase is secondary data collected at each site. Recognizing the need for balancing timely reporting with the time needed for complete data collection, activities of this phase of the project can be broken down into five broad categories:

- a) Identification and timely reporting of lab confirmed hospital admissions, ICU admissions and deaths;
- b) Investigation/collection and reporting of case information on ICU admissions and deaths;
- c) Completion of case-level dataset for all influenza hospital admissions;
- d) Reporting of population denominator data; and,
- e) Reporting of laboratory testing data including subtyping data.

Given the need for prioritization of case identification and data gathering of the most severe cases, the deliverables for this phase of the project are a series of de-identified datasets submitted at different times that must be linkable through a unique identifier assigned by the Contractor and restricted on a need to know basis. Timelines are outlined in table 1.

A completion rate of 100% is required for all data elements; however, content values to describe unavailable data elements will be permitted and defined in collaboration with the Project Authority in the development of the data dictionary (e.g. pending, not available, unknown etc.). In addition, the Contractor will exercise reasonable efforts to have 100% of sentinel sites reporting at each reporting interval.

The Contractor will monitor data security, validity, completion, and timeliness targets on a weekly basis and provide a data quality report as part of the status reporting deliverables (Table 3). The Contractor must ensure availability of staff with whom the Project Authority can consult within 24 hours of data submission to discuss any issues related to data quality and/or completeness. Completion rates for each data element and an assessment of content values will also be monitored on a seasonal basis and will inform protocol review for the subsequent influenza surveillance season (i.e. need for data dictionary modification).

**Table 1. Phase three deliverables (routine surveillance)**

Activity	Deliverable	Timeline†	Performance Standard‡
<p>Compilation of influenza case finding and reporting including compilation and reporting of influenza case data on ICU admissions and deaths</p>	<p>Case-level data must include the following:</p> <ul style="list-style-type: none"> <li>• Site #;</li> <li>• Unique identifier (Contractor assigned);</li> <li>• Date of admission;</li> <li>• Date of laboratory confirmation;</li> <li>• Epidemiological week of lab confirmation;</li> <li>• Age in years;</li> <li>• Age group*;</li> <li>• Gender;</li> <li>• Influenza type;</li> <li>• Influenza subtype when available ;</li> <li>• Comorbidity status overall (Y/N/Unk)</li> <li>• Influenza immunization status (Y/N/Unk).</li> <li>• Intensive Care Unit (ICU) admission (Y/N/Unk);</li> <li>• Death (Y/N/Unk);</li> <li>• Date of Death;</li> <li>• ICU admission (Y/N);</li> <li>• Date Admitted to ICU;</li> <li>• Comorbidity Status (Y/N) for: Endocrine, cardiac, vascular, pulmonary, renal, neuromuscular, liver, gastrointestinal, cancer, rheumatologic, mental health, other chronic illness; and</li> <li>• Influenza immunization Status for Current Season (reported).</li> </ul>	<p>Weekly- for week starting Sunday and ending Saturday, data must be available by 9am, Eastern Standard Time on Thursday the following week</p> <p>Starting November annually (Week 45)</p> <p>Weekly cumulative each surveillance season</p> <p>Ending when PHAC declares interseasonal levels have resumed (typically mid to late May on or before week 22: weeks of May 24- May 30, 2021 and May 22, 2022 to May 28, 2022)</p>	<p><b>Reporting:</b> 100% of sentinel sites</p> <p><b>Data Elements:</b> 100% completion rate each week</p>
<p>Compilation of complete line list for all influenza hospital admissions</p>	<p>Influenza Case-level data must include the following:</p> <p><u>Group A</u></p> <ul style="list-style-type: none"> <li>• Site #;</li> <li>• Unique identifier;</li> <li>• Epidemiological week of first report to PHAC;</li> </ul> <p><u>Group B</u></p> <ul style="list-style-type: none"> <li>• Age in years;</li> <li>• Age group*;</li> <li>• Gender;</li> </ul>	<p>To be provided no later than October 1st of each year with data for all hospitalization cases. Any updates on case level data are to be done until the end of August.</p>	<p><b>Reporting:</b> 100% of sentinel sites</p> <p><b>Group A Data Elements:</b> 100% completion rate and no cases with unavailable content value (e.g. unknown, not available etc.) for each variable</p>

Activity	Deliverable	Timeline†	Performance Standard‡
	<ul style="list-style-type: none"> <li>• Date of admission;</li> <li>• Date of laboratory confirmation;</li> <li>• Epidemiological week of laboratory confirmation;</li> <li>• Influenza type.</li> </ul> <p><u>Group C</u></p> <ul style="list-style-type: none"> <li>• Influenza subtype;</li> <li>• Influenza immunization status for current season (immunized – Y/N);</li> <li>• Validated Influenza immunization Status for Current Season (Status Validated –Y/N);</li> <li>• Comorbidity Status (Y/N) for: <ul style="list-style-type: none"> <li>○ Endocrine, cardiac, vascular, pulmonary, renal, neuromuscular, liver, gastrointestinal, cancer, rheumatologic, mental health, other chronic illness;</li> </ul> </li> <li>• ICU admission;</li> <li>• Date of ICU admission;</li> <li>• Date of discharge (including not yet discharged);</li> <li>• Discharge disposition (including not yet discharged); and,</li> <li>• The outcome, if available (survived, died of influenza infection, died of other causes).</li> <li>• Date of symptom onset;</li> <li>• Forward Sortation Area;</li> <li>• Antiviral treatment given in hospital and date started.</li> </ul> <p><u>Group D</u></p> <ul style="list-style-type: none"> <li>• Residence type (e.g. household, long term care facility etc.)</li> <li>• Aboriginal Identity, Unspecified (patient self-identification - yes/no/unk);</li> <li>• Pregnancy status (yes/no/unk);</li> <li>• If pregnant, gestational age;</li> <li>• Presence of lab-confirmed</li> </ul>		<p><b>Group B Data Elements:</b> 100% completion rate and maximum of 5% of cases with unavailable content value (e.g. unknown, not available etc.) for each variable</p> <p><b>Group C Data Elements:</b> 100% completion rate and maximum of 20% of cases with unavailable content value (e.g. unknown, not available etc.) for each variable</p> <p><b>Group D Data Elements:</b> 100% completion rate for each variable</p>

Activity	Deliverable	Timeline†	Performance Standard‡
	<p>secondary bacterial/viral infections; if yes, name of pathogen and type of infection within the limitation of local testing done as standard care; and,</p> <ul style="list-style-type: none"> <li>• Mechanical ventilation.</li> </ul>		
Denominator Data	<p>Hospital admissions by epidemiological week and age group* must include:</p> <ul style="list-style-type: none"> <li>• All cause; and</li> <li>• All respiratory causes by ICD code (J00 to J99) (Appendix B);</li> <li>• All respiratory causes by International Classification of Disease (ICD) code (J09-J11).</li> </ul> <p>ICU admissions by epidemiological week and age group* must include:</p> <ul style="list-style-type: none"> <li>• All cause; and</li> <li>• All respiratory causes by ICD code (J00 to J99) (Appendix B);</li> <li>• All respiratory causes by International Classification of Disease (ICD) code (J09-J11).</li> </ul> <p>Deaths by epidemiological week and age group* must include:</p> <ul style="list-style-type: none"> <li>• All cause; and</li> <li>• All respiratory causes by ICD code (J00 to J99) (Appendix B);</li> <li>• All respiratory causes by International Classification of Disease (ICD) code (J09-J11).</li> </ul>	<p>Annually, August 31st of each year with cases from week 45 up to the end of the influenza season (typically mid to late May on or before week 22: weeks of May 24-May 30, 2021 and May 22, 2022 to May 28, 2022)</p>	<p><b>Reporting:</b> 100% of sentinel sites</p>
Laboratory Testing Data	<p>In one dataset:</p> <p>Number of influenza tests performed by epidemiological week and age group by site*</p> <p>Number of positive influenza tests by epidemiological week and age group by site*</p>	<p>Annually, August 31st of each year with cases from week 45 up to the end of the influenza season (typically mid to late May on or before week 22: weeks of May</p>	<p><b>Reporting:</b> 100% of sentinel sites</p>

Activity	Deliverable	Timeline†	Performance Standard‡
		24- May 30, 2021 and May 22, 2022 to May 28, 2022)	

†Timelines for data receipt can be negotiated in the protocol development phase

‡ The performance standard of 100% completion rate includes unavailable content values (e.g. n/a, missing etc) and is set at 100% to ensure that there are no blank fields

\*Age groups:16-19 years; 20-24 years and by 5 year age band up to 84 years; 85+ years

#### **Phase 4: Vaccine Effectiveness Monitoring**

The Work in this Phase involves the Contractor completing an estimation of the effectiveness of the seasonal influenza vaccine at two points in the surveillance season, as determined by status of project enrolment vis à vis sample size requirements outlined in the project protocol (see Phase 2), using the case data gathered through surveillance activities and non-case data gathered as outlined in the protocol submitted at the beginning of the surveillance season. If the sample size is not sufficient to derive an accurate within-season estimate of VE by February 15 annually, the Contractor will inform the Project Authority and request direction on required action plan.

For this phase, the Contractor's resources will involve reporting on project findings, namely the vaccine effectiveness (VE) estimates as outlined in Table 2. Monthly VE datasets will be used to monitor recruitment and data quality.

**Table 2. Phase four deliverables (vaccine effectiveness monitoring)**

Activity	Deliverable	Timeline
VE Estimation Dataset	De-identified line list used for vaccine effectiveness estimation including all data elements used for the vaccine effectiveness estimation  Data for controls must include the respiratory viral pathogen(s) detected (e.g. respiratory syncytial virus (RSV), parainfluenza, adenovirus, human metapneumovirus, enterovirus/rhinovirus, coronavirus), as well as all data elements used for the VE estimation.	Twice  Annually: Feb. 15 Aug. 31
Produce an Interim Estimate	Interim vaccine effectiveness estimates with 95% confidence intervals where sample size and power are sufficient to support valid estimation must include the following: <ul style="list-style-type: none"> <li>• Crude VE; and</li> <li>• Adjusted VE and method of adjustment</li> </ul> and stratified analysis using the following strata (sample size permitting): <ul style="list-style-type: none"> <li>• Age groups;</li> <li>• Presence of absence of high-risk conditions;</li> <li>• Time: early, peak and late influenza season;</li> <li>• Virus type; and</li> <li>• Virus subtype</li> </ul> Locked down de-identified line list including all data	At least 5 days before submission for publication and at least 14 days before publication and on or before February 15 annually.

Activity	Deliverable	Timeline
	elements used for the interim vaccine effectiveness estimation regardless as to whether or not an estimate can be calculated.	
Produce an Annual Final Status (summary) Report including Final VE Estimates	<p>Final summary report detailing all activities and findings of the VE estimation as per the reporting standards outlined in the Strengthening the Reporting of Observational Epidemiology (STROBE)<sup>1</sup> and also including a list of publications and presentations of data gathered for the purpose of the Contract must be provided to the Project Authority.</p> <p>Year-end vaccine effectiveness estimates with 95% confidence intervals as described for the interim estimate and including sensitivity analyses to explore other potential confounders and effect modifiers if sample size is sufficient to do so (e.g. antiviral administration, previous vaccinations, site variation etc.) must be provided to the Project Authority.</p>	At least 5 days before submission for publication and/or 14 days before publication and on or before August 31st of each year

### Progress Reporting Deliverables

The Contractor will provide a verbal update via teleconference at a minimum of three times annually outlining the milestones achieved for the given period, open issues, and upcoming milestones as detailed in Table 3. In addition, at the end of the Contract, the Contractor must provide a report that summarizes the lessons learned in the development and maintenance of the sentinel surveillance network for the purpose of vaccine effectiveness monitoring.

**Table 3. Progress Reporting Deliverables**

Activity	Deliverable	Timeline
Verbal Status Reports	<p>A minimum of three (3) teleconferences will be convened between the Contractor and the Project Authority to discuss the activities of the surveillance and VE monitoring components of the Contract. The update must include, at a minimum:</p> <ul style="list-style-type: none"> <li>• Status of Contract milestones (e.g. network establishment, case report form, data dictionary, data submission guide, study enrollment etc.);</li> <li>• Open Issues; and,</li> <li>• Upcoming milestones.</li> </ul>	<p>To be scheduled at a time suitable for both the Contractor and PHAC in the months of</p> <ul style="list-style-type: none"> <li>• January</li> <li>• April</li> <li>• August</li> </ul>
Lessons Learned Report	<p>A report detailing lessons learned throughout the Contract including the following at a minimum:</p> <ul style="list-style-type: none"> <li>• Success factors;</li> <li>• Primary challenges and risks; and,</li> <li>• Opportunities/ recommendations for improvement.</li> </ul>	Annually on or before August 31.

<sup>1</sup> The Strengthening the Reporting of Observational Studies in Epidemiology (STROBE) Statement: Guidelines for Reporting Observational Studies. J Clin Epidemiol. 2008; 61(4):334-9.

## Resources:

While other resources will be required to complete the tasks, activities, deliverables, and milestones described in this section 3 “Requirements” of this Statement of Work; the primary resource is described below:

### 1. Principal Investigator:

The Principal Investigator (or approved designate) is the day-to-day single point of contact for the Contractor’s team responsible for the supervision and conduct of work. The responsibilities of this individual include but are not limited to the following:

- Develop and govern the implementation of the surveillance and monitoring protocols;
- Ensure close and regular communication with the sentinel site team members;
- Ensure appropriate identification, investigation and confirmation of cases of influenza in compliance with the surveillance protocol and case report form;
- Ensure data are safeguarded, gathered, and reported as outlined in Table 1 by all sites and merged prior to submission to PHAC;
- Oversee the management and security of the database of case reports from all hospitals;
- Ensure appropriate information management practices, data quality measures, and security safeguards are in place for database management;
- Oversee the development and maintenance of procedures and tools for data transfer to PHAC;
- Participate in approximately one teleconference meeting each quarter to share surveillance and VE monitoring findings with Provincial and Territorial surveillance counterparts
- Work in close and frequent contact with the Project Authority and other PHAC personnel, as well as the Contracting Authority;

### 3.2. Specifications and Standards

All data must be secured and provided in an electronic format accessible to PHAC. If the PHAC data submission standards change during the life of this Contract, the Project Authority will identify the new standard to the Contractor and will work with the Contractor on meeting the new standards.

All data must be valid and meet completeness and timeliness standards outlined in Section 3.1.

Before datasets are transferred to the PHAC any data that could reasonably be expected to identify an individual such as names, etc. must be removed and replaced with an impersonal unique person identification number.

The Work is to be completed and submitted within the time lines outlined in Section 3.1.

The Contractor must adhere to Chapter 5 Privacy and Confidentiality and the epidemiological practices as outlined in the [Canada’s Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans.](#)

The Contractor must obtain all required exemptions or approvals necessary for the project from each sentinel site. In addition, depending on the design of the VE protocol this may also include review by the Health Canada/Public Health Agency of Canada Research and Ethics Board (e.g. for exemption). If such a review is required and results in a delay to the Work, such delay shall be an Excusable Delay (without any need for advising the Contracting Authority of a work around plan) and timelines for completion under this Contract shall be adjusted accordingly.

### 3.3. Technical, Operational and Organizational Environment

All tools for the implementation of this Contract (e.g. computer hardware and software) will be provided by the Contractor.

### **3.4. Method and Source of Acceptance**

All Work rendered under the Contract, including revisions, will be subject to approval by the Project Authority. Any communication with the Contractor about the quality of Work performed under the Contract must be undertaken by correspondence through the Project Authority with a copy to the Contracting Authority. The Contractor must provide the Project Authority with all deliverables electronically in a format acceptable to PHAC.

The Project Authority has the right to reject any deliverables that are not considered satisfactory or the Project Authority can require their correction before payment will be authorized by the PHAC to the Contractor.

### **3.5. Reporting Requirements**

In addition to the timely submission of the deliverables and the fulfillment of all obligations under this Contract, it is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Authority.

Communication is defined as all reasonable effort to inform the Project Authority of plans, decisions, proposed approaches, implementation, and results of Work, to ensure that the Work is progressing well and in accordance with expectations. Communication may include phone calls, electronic mail, and meetings.

The Contractor is to immediately notify the Project Authority of any breaches, issues, problems or areas of concern, relating to any Work completed under this Contract.

## **4. ADDITIONAL INFORMATION**

### **4.1. Canada's Obligations**

Canada will provide ongoing liaison to provide feedback and guidance as required. To ensure that the contract deliverables will be of acceptable quality, completed on time and within budget, Canada shall:

- Monitor the data collection process through regular conference calls and/or emails,
- Receive, review and accept deliverables and;
- Ensure that the payment schedule corresponds to the measurement of performance throughout the contract

Canada's facilities, equipment and personnel are not available to the Contractor to perform the Work unless the Contract specifically provides for it.

### **4.2. Contractor's Obligations**

The Contractor will be responsible for the preparation, conduct, and administration of the Work in compliance with applicable laws including the *Privacy Act*, associated regulations and institutional policies. Other Contractor Requirements include:

- Hire and ensure proper training of sentinel site team members including the handling of personal information and breach reporting;
- Maintain ethics approval or exemption with hospital Research Ethics Boards (REB) as necessary;
- Maintain administrative approval for the project with hospital administration; and,
- Liaise with the Project Authority for meetings and other related project management activities;
- Attend meetings/teleconferences with stakeholders if considered necessary by the Project Authority;
- Submit all deliverables within the timelines outlined in Section 3.1;



- Keep all data, documents, and proprietary information confidential;
- Use its own equipment and software for the performance of this Work;
- Obtain administrative approval for surveillance and monitoring with the hospital administration or appropriate department if applicable;
- Manage the data collected in from hospitals in accordance with hospital policy and Federal, Provincial and Territorial privacy legislation of each sentinel site (i.e. hospital) location;
- Meet with the representatives of each sentinel site (i.e. hospital) to resolve issues if and when they arise; the Contractor will be responsible for any associated costs (i.e. travel).

#### **4.3. Location of Work, Work site and Delivery Point**

Work will be completed at hospital sites in Canada as described in the System Overview Report.

Work will be delivered to the:

Influenza and Emerging Respiratory Infections Surveillance  
 Centre for Immunization and Respiratory Infectious Diseases  
 Public Health Agency of Canada  
 130 Colonnade Road, Room 139A-06  
 Ottawa, ON K1A 0K9  
 Email: [phac.fluwatch.aspc@canada.ca](mailto:phac.fluwatch.aspc@canada.ca)

#### **4.4. Language of Work**

All communication with the Client will be in English and all deliverables will be completed in English. The Contractor may be expected to work in the working language of each hospital site.

### **5. PROJECT SCHEDULE**

#### **5.1. Schedule and Estimated Level of Effort (Work Breakdown Structure)**

As described in Section 3 Requirements.

### **6. GLOSSARY**

CIRID	Centre for Immunization and Respiratory Infectious Diseases
FSA	Forward Sortation Unit
ICU	Intensive Care Unit
ICD	International Classification of Disease
IDPCB	Infectious Disease Prevention and Control Branch
PAHO	Pan-American Health Organization
PHAC	Public Health Agency of Canada
REB	Research Ethics Board
RSV	Respiratory Syncytial Virus
STROBE	Strengthening the Reporting of Observational Epidemiology
VE	Vaccine Effectiveness
WHO	World Health Organization

## 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 firm unit price for each milestone as specified in the pricing tables below.

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.

### SCHEDULE OF MILESTONES

#### CONTRACT PERIOD: SEPTEMBER 1, 2020 – AUGUST 31, 2021

MILESTONE #	DELIVERABLES	DUE DATES	FIRM PRICE
1	Weekly flu data (8 weeks), System Overview (includes site data), Protocol, Network Adaptation.	On or before December 31, 2020	\$
2	Weekly flu data (9 weeks) VE dataset, Interim estimate.	On or before February 28, 2021	\$
3	Weekly flu data. (5 weeks)	On or before March 31, 2021	\$
4	Weekly flu data (8 weeks), Denominator data, Lab testing data, Final dataset, Final VE Estimate, Final locked down dataset, Lessons learned report.	On or before August 31, 2021	\$

#### CONTRACT PERIOD: SEPTEMBER 1, 2021 – AUGUST 31, 2022

MILESTONE #	DELIVERABLES	DUE DATES	FIRM PRICE
1	System Overview & Protocol, Network Adaptation, Weekly flu data. (8 weeks)	On or before December 31, 2021	\$
2	Weekly flu data (9 weeks), VE dataset, Interim estimate.	On or before February 28, 2022	\$
3	Weekly flu data. (5 weeks)	On or before March 31, 2022	\$
4	Weekly flu data (8 weeks), Denominator data, Lab testing data, Final dataset, Final VE Estimate, Final locked down dataset, Lessons learned report.	On or before August 31, 2022	\$

**CONTRACT PERIOD: SEPTEMBER 1, 2022 – AUGUST 31, 2023**

<b>MILESTONE #</b>	<b>DELIVERABLES</b>	<b>DUE DATES</b>	<b>FIRM PRICE</b>
1	System Overview & Protocol, Network Adaptation, Weekly flu data. (8 weeks)	On or before December 31, 2022	\$
2	Weekly flu data (9 weeks), VE dataset, Interim estimate.	On or before February 28, 2023	\$
3	Weekly flu data. (5 weeks)	On or before March 31, 2023	\$
4	Weekly flu data (8 weeks), Denominator data, Lab testing data, Final dataset, Final VE Estimate, Final locked down dataset, Lessons learned report.	On or before August 31, 2023	\$