



RETURN BIDS TO : - RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada
See herein / Voir dans ce document

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 et ci-jointes, 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)

Blank lines for bidder's legal name and address.

Bidder is required to 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

AMENDMENT TO REQUEST FOR PROPOSAL / MODIFICATION DE DEMANDE DE PROPOSITION

Form containing details: Title - Sujet (Online Survey Tool), Solicitation No. - No de l'invitation (1000348876), Date (2020-06-01), Amendment No. - N° modif. (003), Solicitation closes - L'invitation prend fin on - le 2020-07-02 at - à 11:59 P.M. / 23:59 h, Time zone - Fuseau horaire (EDT/HAE), Contracting Authority - Autorité contractante (Name: Timothy Berg, Address: 250 Albert St. Ottawa, ON, K1A 0L5, E-mail: 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).



SOLICITATION AMENDMENT # 003

This solicitation amendment is raised to:

1. Address the questions submitted during the solicitation period as per RFP; and
 2. Amend the RFP.
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1. QUESTIONS AND ANSWERS

Q1. Who is the current survey tool provider?

A1. The current survey tool provider is OutsideSoft Solutions Inc.

See Tender Award Notice PW-15-00705778. <https://buyandsell.gc.ca/procurement-data/award-notice/PW-15-00705778-001>.

Q2. How many respondents/completes did CRA do last year? Over how many surveys?

A2. We had approximately 500,000 completes over the last year from roughly 75 surveys.

Please note that all data regarding prior usage by CRA is provided to bidders purely for information purposes, and to assist them in preparing their bids. This represents the best information currently available to CRA however, CRA does not warrant or represent that this data is complete or free from errors. Additionally, the inclusion of this data in this solicitation does not represent a commitment that CRA's future usage will be consistent with this data. It is provided purely for informational purposes.

Q3. Is there an expected budget for the all-inclusive annual rate?

A3. We do not have an expected budget.

Q4. Considering the recent stay at home directives in Quebec and most of the country, will you consider accepting electronic / email submissions?

A4. When responding, the proposal **MUST** be sent by fax or using an electronic/online -fax service to **418-562-3058**. Bidders should keep a copy of their fax transmission report for record keeping purposes.

ONLY ELECTRONIC BIDS WILL BE ACCEPTED. Due to the COVID-19 situation, the delivery of a physical (paper) proposal is not considered to be practical and therefore physical proposals will not be accepted.

Please see Section 2 – Amendments to the RFP, below.

Q5. Regarding M01:
what is an appropriate supporting document detail for this?
is certifying that we do protect against these threats enough?

A5. This requirement has been removed from Appendix 1: Mandatory Criteria. Please note that this criterion remains mandatory, but has been removed from Appendix 1.

Please see Section 2 – Amendments to the RFP, below.



- Q6.** Regarding M02:
Do you have an estimate of needed storage space for all such content over a year?
Over last contract period?
How much is collected data vs images/videos?
Is CRA open to archiving older projects?
- A6.** We do not have an estimated amount of storage space.
Please see A2 above for number of surveys and completes from last year.
95% is collected data vs images/videos.
CRA is open to archiving older projects. CRA must have access to all content created throughout the duration of the contract.
- Q7.** Regarding R23 :
May you provide some clarification on Text Analysis?
Is this for open end coding or other uses?
What is the end objective?
- A7.** Basic Text Analysis refers to the frequency counts of words, producing a word cloud based on frequencies and the ability to remove “stop words” so they are not included in the count within the tool for a quick snapshot of the open text responses.
The objective is to be able to do open end coding for further and more advanced text analysis outside of the tool.
- Q8.** Regarding the model contract in section 6 of the RFP – section 6.15 : if we accept 2 of the 3 payment methods, is that acceptable?
- A8.** No. The payment method will be selected at Canada’s discretion as per Article 6.15 of the Model Contract.

Please see Section 2 – Amendments to the RFP, below.
- Q9.** Typically these are managed by the number of survey responses (vs the # of users). What is your estimated number of survey responses over the last 3 years? What is your projected growth for the next year?
- A9.** We would estimate about 500,000 completes per year, with roughly a 10% growth for next year.

Please note that all data regarding prior usage by CRA is provided to bidders purely for information purposes, and to assist them in preparing their bids. This represents the best information currently available to CRA however, CRA does not warrant or represent that this data is complete or free from errors. Additionally, the inclusion of this data in this solicitation does not represent a commitment that CRA’s future usage will be consistent with this data. It is provided purely for informational purposes.
- Q10.** R4 – says WCAG 2.0 – AAA vs in Annex A 4.1.1 it says – AA. Which is it?
- A10.** Annex A indicates that the survey tool must meet the WCAG 2.0 at the AA level. All requirements found in Annex A: Statement of Requirement are mandatory. R04 indicates that the Online Survey Tool should meet WCAG 2.0 at the AAA level. The requirements found in Appendix 2: Point Rated Criteria are not mandatory, but point-rated. Please review Part 4 Evaluation and Selection of the RFP for further clarifications.



Q11. Can you provide 3-4 use cases of the types of surveys?

- A11.**
- 1 Satisfaction surveys – for users to provide their feedback after using our online portals.
 - 2 Employee Surveys – to gauge satisfaction and gain insight to improve our internal programs and services.
 - 3 Evaluation and Feedback on courses or programs – a survey sent to individuals after participating in a program or course.

Q12. What tools are you currently using?

A12. Please see A1 above.

Q13. R1 – We noticed that this was NOT a mandatory requirement (hosting servers security in Canada). We would recommend that this is mandatory.

You will likely have use cases / questions in the future that will deal with Protected A & B applications.

In the event that you want to conduct a type of survey that has sensitive information, etc, you will not be able to unless this is in a Canadian Protected B environment.

A13. Thank you for your recommendation. We do not require a protected environment for our data as the nature of Public Opinion Research (POR) is to collect the information anonymously. We recognize the importance of the security and safety of any type of information, which is why we have provided points to Bidders if their servers are hosted in Canada.

Q14. In light of the effects of COVID-19, will CRA remove the requirement for hard copy submissions and mailing of any responses? Can vendors respond via email?

A14. Please see A4 above.

Q15. Please confirm CRA wishes to see the responses organized in the following manner:

Section I: Technical Bid will include the following:

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.

Annexes

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

ANNEX A: STATEMENT OF REQUIREMENT

ANNEX B: BASIS OF PAYMENT

Appendix 1: Mandatory Criteria

Appendix 2: Point Rated Criteria

Section II: Financial Bid will include the following:



Appendix 3: Financial Proposal
Part 6 Model Contract

Section III: Certifications
Solicitation Cover Sheet
Part 5

5.1 Certifications Required To Be Submitted At Time of Bid Closing

5.2 Certifications Precedent to Contract Award and Associated Information

A15. Please see Section 2 – Amendments to the RFP, below for further details.



2. AMENDMENTS TO THE RFP

1. On the front page of the Request For Proposal document, under Solicitation closes:

DELETE :

on – le 2020-07-02

at – à 2:00 P.M. / 14 h

INSERT:

on – le 2020-07-02

at – à 11:59 P.M. / 23:59 h

2. DELETE IN ITS ENTIRETY Part 2 Bidder Instructions and INSERT:

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 (2019-03-04) 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 (2019-03-04) are revised as follows.

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



1. The *Supplier Integrity Directive* (SID) dated May 24, 2016, is incorporated by reference into, and forms a binding part of the bid solicitation. The Bidder must comply with the SID, which can be found on the Canada Revenue Agency's website at <https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.html>
2. Under the SID, charges and convictions of certain offences against a Supplier, its affiliates or first tier 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 (<https://www.canada.ca/en/revenue-agency/corporate/about-canada-revenue-agency-cra/procurement-cra/supplier-integrity-directive.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 <https://www.canada.ca/en/services/taxes/business-number.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 by fax or using an electronic/online-fax service only to the telephone number 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", clause 6 is deleted in its entirety and replaced with the following:

"CRA will return or delete bids delivered after the stipulated solicitation closing date and time, unless they qualify as a delayed bid as described in section 07.

For late bids submitted either by fax, or by an electronic/online fax service, the physical bid will not be returned. Rather, late bids submitted in this manner will be deleted. Records will be kept documenting the transaction history of all late bids submitted.

Section 07 titled "Delayed Bids", all references to "PWGSC" are hereby deleted and replaced with "CRA". In addition paragraph 1(b) is deleted in its entirety and replaced with the following:

b. The only piece of evidence relating to a delay in the electronic/online fax service that is acceptable to CRA is the official time stamp of when the file was received by CRA on the electronic/online fax server and that clearly indicates that the bid was received before the solicitation closing date and time.

Section 08 titled "Transmission by facsimile or by epost Connect" is deleted in its entirety and replaced with the following:

Section 08 titled Transmission by facsimile or using an electronic/online fax service

1. Facsimile

- a. Unless otherwise specified in the bid solicitation, bids may be submitted by facsimile.
 - i. The only acceptable facsimile number for responses to bid solicitations issued by the CRA is **418-562-3058**, or, if applicable, the facsimile number identified in the bid solicitation.
- b. For bids transmitted by facsimile, the CRA will not be responsible for any failure attributable to the transmission or receipt of the faxed bid including, but not limited to, the following:
 - i. receipt of garbled, corrupted or incomplete bid;
 - ii. availability or condition of the receiving facsimile equipment;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid; or
 - vii. security of bid data.
- c. A bid transmitted by facsimile constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.
- d. The bid solicitation number should be identified in the cover page of all faxed transmissions.



- e. Bidders must ensure that that they are using the correct facsimile number .
- f. Bidders are discouraged from using colours and shades in their bid documents as transmittal process may render the information non readable.

2. Electronic/Online Fax Service

- a. Unless otherwise specified in the bid solicitation, bids may be submitted by using an electronic/online fax service (for example eFax, Metrofax, Myfax, Hellofax, Ring Central Fax etc.),
 - i. The only acceptable facsimile number for responses to bid solicitations issued by the CRA is **418-562-3058**, or, if applicable, the facsimile number identified in the bid solicitation.
- b. To submit a bid using an electronic/online fax service, the Bidder must send its bid directly only to the specified facsimile number provided using its own software or licensing agreement for electronic/online fax services.
- c. The bid solicitation number should be identified in the cover page of all electronic/online fax service transmissions.
- d. For bids transmitted by electronic/online fax service, Canada will not be responsible for any failure attributable to the transmission or receipt of the bid including, but not limited to, the following:
 - i. receipt of a garbled, corrupted or incomplete bid;
 - ii. availability or condition of the electronic/online fax service;
 - iii. incompatibility between the sending and receiving equipment;
 - iv. delay in transmission or receipt of the bid;
 - v. failure of the Bidder to properly identify the bid;
 - vi. illegibility of the bid;
 - vii. security of bid data; or,
 - viii. inability to transmit through the electronic/online fax service.
- e. The Bid Receiving Unit for the CRA will send an acknowledgement of the receipt of bid document(s). When the transmission using the electronic/online fax service is complete a time stamp will be applied and the file saved. An acknowledgement of receipt will be provided to the sender.

Note that the acknowledgement sent is time zone specific to the sender's machine, and may not accurately indicate when the bid was received. This acknowledgement of receipt will confirm only the receipt of bid document(s) and will not confirm if the content is readable.
- f. Bidders must ensure that that they are using the correct facsimile number for the Bid Receiving Unit when submitting bid using an electronic/online fax service
- g. A bid transmitted using an electronic/online fax service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05.

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 MUST be sent by fax or using an electronic/online -fax service to **418-562-3058**.

Bidders should keep a copy of their fax transmission report for record keeping purposes.

ONLY ELECTRONIC BIDS WILL BE ACCEPTED. Due to the COVID-19 situation, the delivery of a physical (paper) proposal is not considered to be practical and therefore physical proposals 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.



3. DELETE IN ITS ENTIRETY Part 3 Proposal Preparation Instructions and INSERT:

Part 3 Proposal Preparation Instructions

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

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

Section I: Technical Bid

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

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

Section II: Financial Bid

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

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 use a numbering system corresponding to that of the bid solicitation.



4. DELETE Table 1.0 MANDATORY REQUIREMENTS in Appendix 1: Mandatory Criteria and INSERT:

1.0 MANDATORY REQUIREMENTS

#	Mandatory Requirement Description	Supporting Documentation Details/Bid Reference
M1	The Online Survey Tool must collect and store all Content for the duration of the contract.	
M2	The Online Survey Tool must provide English and French interfaces.	

5. Under Part 6 Model Contract, at Article 6.4 Standard Clauses and Conditions:

DELETE:

H1000C	Single Payment	2008-05-12
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6. Under Part 6 Model Contract, DELETE Article 6.15.2 Payment by Credit Card.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED