



REQUEST FOR PROPOSAL DEMANDE DE PROPOSITION

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

Heather.Ross@tbs-sct.gc.ca & zzTBSCONT@tbs-sct.gc.ca

Proposal to: Treasury Board of Canada Secretariat

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

Propositions aux : Secrétariat du Conseil du Trésor 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 articles et les services énumérés ici et sur toute feuille ci-annexée, au(x) prix indiqué(s).

Solicitation No. - N° de l'invitation 24062-21-083	Type - Genre	Update - Mise à jour
Solicitation closes - La demande prend fin at - à 2:00 PM EST on - le January 4, 2021	TBS File No. - N° de dossier de SCT 24062-21-083	

Date of Solicitation - Date de la demande November 23, 2020	
Address inquiries to - Adresser toute demande de renseignements à : Heather Ross, Senior Contracting Officer heather.ross@tbs-sct.gc.ca	
Area code and Telephone No. Code régional et N° de téléphone 613-291-3773	Facsimile No. N° de télécopieur NA
Special Instructions- Instructions spéciales	

**Instructions:
Municipal taxes are not applicable.**

Unless otherwise specified herein by the Crown, all prices quoted are to be net prices in Canadian funds including Canadian customs duties, excise taxes, and are to be F.O.B, including all delivery charges to destination(s) as indicated. The amount of the GST/HST is to be shown as a separate item.

**Instructions:
Les taxes municipales ne s'appliquent pas.**

Sauf indication contraire, énoncée par la Couronne, dans les présentes, tous les prix indiqués sont des prix nets, en dollars canadiens, comprenant les droits de douane canadiens, la taxe d'accise et doivent être F.A.B, y compris tous frais de livraison à la (aux) destination(s) indiquée(s). La somme de la TPS/TVH devra être un article particulier.

Delivery required - Livraison exigée	Delivery offered - Livraison proposée
Vendor Name Address - Nom et adresse du fournisseur	
Facsimile No. - N° de télécopieur	
Telephone No. - N° de téléphone	
Name and title of person authorized to sign on behalf of vendor (type or print) - Nom et titre de la personne autorisée à signer au nom du fournisseur (caractère d'impression)	
Name / Nom	
Title/ Titre	
Signature : _____	
Date : _____	

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PART 1 - GENERAL INFORMATION

1.1 Introduction

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

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

1.2 Summary

- a. This bid solicitation is being issued to satisfy the requirement of the Treasury Board of Canada Secretariat (the "**Client**") for the conduction of compensation comparability and job evaluation studies for selected bargaining units and/or occupational groups within the Federal Public Service.
- b. It is intended to result in the award of one (1) contract for five (5) years.
- c. Bidders must provide a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2003 and 2004.
- d. Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in Part 5 – Certifications of the bid solicitation.
- e. There is a security requirement associated with this requirement. For additional information, see Part 6 – Security, Financial and Other Requirements, and Part 7 – Resulting Contract Clauses. Bidders should consult the "Security Requirements on PWGSC Bid Solicitations – Instructions for Bidders" document on the Departmental Standard Procurement Documents (<http://ssi-iss.tpsgc-pwgsc.gc.ca>) Website.
- f. The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada Korea Free Trade Agreement (CKFTA), the Canada-Chile Free Trade Agreement (CCFTA), the Canada Free Trade Agreement (CFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Columbia Free Trade Agreement (CColFTA), and the Canada-Panama Free Trade Agreement (CPanFTA) if it is in force.
- g. The Federal Contractor's Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications, Part 7 – Resulting Contract Clauses and the attachment titled "Federal Contractor's Program for Employment Equity – Certification."

1.3 Debriefings

After contract award, 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 of receipt of the results of the bid solicitation process. The debriefing may be provided in writing, by telephone or in person.

A de-brief is intended to:

1. Provide the Bidder with feedback on their proposal and the solicitation process;
2. Review the evaluation of the Bidder's proposal and explain where they met or failed to meet the criteria;
3. Identify strengths and weaknesses in the Bidder's proposal to assist them with preparing future proposals.

A de-brief is not an opportunity for the Bidder to debate the evaluation or request a re-evaluation of the proposal.

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 (PWGSC*).

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.

All references to the Minister of Public Works and Government Services should be deleted and replaced with the President of the Treasury Board. Also all reference to the Department of Public Works and Government Services should be deleted and replaced with the Treasury Board of Canada Secretariat.

The [2003](#) (2020-05-28) 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: 180 days

*** Now known formally as Public Services and Procurement Canada (PSPC).**

2.2 Submission of Bids

Responses are to be sent by email to: Heather Ross

Contracting Authority:

E-mail: Heather.Ross@tbs-sct.gc.ca & zzTBSCONT@tbs-sct.gc.ca

By 2:00 PM (14:00)

On Tuesday January 4th, 2021

Time Zone: Eastern Standard Time (EST)

2.3 Submission of Proposal (Bid) By Email

Bidders must submit their proposal electronically by email. However, all financial information must be presented in a separate attachment from the Technical Response information and each attachment should include the solicitation number. Bidders who submit an e-mail response to the proposal, the following applies:

For email transmission of an electronic version, the only acceptable email is:

Heather.Ross@tbs-sct.gc.ca and zzTBSCONT@tbs-sct.gc.ca

The electronic transmission must be received by bid closing date and time as stipulated on page 1 of the RFP and include the solicitation number. For email transmissions, Canada will not be responsible for any failure or delay attributable to the transmission or receipt of the email including but not limited to:

- receipt of incomplete bid
- file size (TBS's maximum allowable is 15MB)
- delay in transmission or receipt of the bid
- failure of the Bidder to properly identify the bid
- illegibility of the bid; or
- security of the bid data.

Please note that .zip files may be rejected by Treasury Board of Canada Secretariat servers.

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

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than 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.

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

2.6 Improvement of Requirement during Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reasons for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority in accordance with the article entitled “Enquiries – Bid Solicitation”. Canada will have the right to accept or reject any or all suggestions.

2.7 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading “[Bid Challenge and Recourse Mechanisms](#)” contains information on potential complaint bodies such as:
 - Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

*** Canada requests that bidders provide their technical, financial and certification bids in separate sections as follows:

Section I: Technical Bid:

1 soft copy via email to: Heather.Ross@tbs-sct.gc.ca & zzTBSCONT@tbs-sct.gc.ca

Section II: Financial Bid:

1 soft copy via email to: Heather.Ross@tbs-sct.gc.ca & zzTBSCONT@tbs-sct.gc.ca

Section III: Certification:

1 soft copy via email to: Heather.Ross@tbs-sct.gc.ca & zzTBSCONT@tbs-sct.gc.ca

The electronic transmission must be received by bid closing date and time as stipulated on page 6 of the RFP and include the solicitation number. Canada will not be responsible for any failure or delay attributable to the transmission or receipt of the email including but not limited to:

- receipt of incomplete bid;
- file size (TBS's maximum allowable is 15MB)
- delay in transmission or receipt of the bid;
- failure of the Bidder to properly identify the bid;
- illegibility of the bid; or
- security of the bid data.

Please note that .zip files may be rejected by Treasury Board of Canada Secretariat servers.

Note to Bidders: FAILURE TO SUBMIT A FINANCIAL PROPOSAL WILL RESULT IN DISQUALIFICATION AND REMOVAL FROM THE BIDDING PROCESS

PRICES MUST APPEAR IN THE FINANCIAL BID ONLY. NO PRICES MUST BE INDICATED IN ANY OTHER SECTION OF THE BID.

A. Format for Bid: Canada requests that bidders follow the format instructions described below in the preparation of their electronic bid :

- i. use 8.5 x 11 inch (216 mm x 279 mm) paper;
- ii. use a numbering system that corresponds to the bid solicitation;
- iii. include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative;
- iv. Include a table of contents; and
- v. Soft copies will be accepted in any of the following electronic formats:
 - Portable Document Format .pdf
 - Microsoft Word 97/2000 (.doc)
 - Microsoft Excel 97/2000 (.xls)

B. Submission of Only One Bid:

- i. The submission of more than one bid from members of the same bidding group is not permitted in response to this bid solicitation. If members of a bidding group participate in more than one bid, Canada will set aside all bids received from members of that bidding group.
- ii. For the purposes of this article, “**bidding group**” means all entities (whether those entities include one or more natural persons, corporations, partnerships, limited liability partnerships, etc.) that are related to one another. Regardless of the jurisdiction where any of the entities concerned is incorporated or otherwise formed as a matter of law, entities are considered “**related**” for the purposes of this bid solicitation if:
 - A. they are the same legal entity (i.e., the same natural person, corporation, partnership, limited liability partnership, etc.);
 - B. they are “related persons” or “affiliated persons” according to the *Canada Income Tax Act*;
 - C. the entities have now or in the two years before bid closing had a fiduciary relationship with one another (either as a result of an agency arrangement or any other form of fiduciary relationship); or
 - D. the entities otherwise do not deal with one another at arm’s length, or each of them does not deal at arm’s length with the same third party.

C. Joint Venture Experience:

- i. Where the Bidder is a joint venture with existing experience as that joint venture, it may submit the experience that it has obtained as that joint venture.

Example: A bidder is a joint venture consisting of members L and O. A bid solicitation requires that the bidder demonstrate experience providing maintenance and help desk services for a period of 24 months to a customer with at least 10,000 users. As a joint venture (consisting of members L and O), the bidder has previously done the work. This bidder can use this experience to meet the requirement. If member L obtained this experience while in a joint venture with a third party N, however, that experience cannot be used because the third party N is not part of the joint venture that is bidding.
- ii. A joint venture bidder may rely on the experience of one of its members to meet any given technical criterion of this bid solicitation.

Example: A bidder is a joint venture consisting of members X, Y and Z. If a solicitation requires: (a) that the bidder have 3 years of experience providing maintenance service, and (b) that the bidder have 2 years of experience integrating hardware with complex networks, then each of these two requirements can be met by a different member of the joint venture. However, for a single criterion, such as the requirement for 3 years of experience providing maintenance services, the bidder cannot indicate that each of members X, Y and Z has one year of experience, totaling 3 years. Such a response would be declared non-responsive.
- iii. Joint venture members cannot pool their abilities with other joint venture members to satisfy a single technical criterion of this bid solicitation. However, a joint venture member can pool its individual experience with the experience of the joint venture itself. Wherever substantiation of a criterion is required, the Bidder is requested to indicate which joint venture member satisfies the requirement. If the Bidder has not identified which joint venture member satisfies the requirement, the Contracting Authority will provide an opportunity to the Bidder to submit this information during the evaluation period. If the

Bidder does not submit this information within the period set by the Contracting Authority, its bid will be declared non-responsive.

Example: A bidder is a joint venture consisting of members A and B. If a bid solicitation requires that the bidder demonstrate experience providing resources for a minimum number of 100 billable days, the bidder may demonstrate that experience by submitting either:

- Contracts all signed by A;
- Contracts all signed by B; or
- Contracts all signed by A and B in joint venture, or
- Contracts signed by A and contracts signed by A and B in joint venture, or
- Contracts signed by B and contracts signed by A and B in joint venture.

That show in total 100 billable days.

- iv. Any Bidder with questions regarding the way in which a joint venture bid will be evaluated should raise such questions through the Enquiries process as early as possible during the bid solicitation period.

3.2 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 and describe their approach 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.

3.3 Section II: Financial Bid

- A.** Bidders must submit their financial bid in Canadian funds and in accordance with the Pricing Schedule as detailed in Attachment 1 to Part 3. The total amount of Applicable Taxes must be shown separately. Unless otherwise indicated, Bidders must include a single, firm, all-inclusive per diem rate in each cell requiring an entry in the pricing tables.
- B.** The financial bid must include all costs for the requirement described in the bid solicitation for the entire Contract Period, including any option periods. The identification of all necessary equipment, software, peripherals, cabling and components required to meet the requirements of the bid solicitation and the associated costs of these items is the sole responsibility of the Bidder.
- C.** When preparing their financial bid, Bidders should review clause 4.3, Financial Evaluation, of Part 4 of the bid solicitation; and article 7.7, Payment, of Part 7 of the resulting contract clauses.

3.4 Section III: Certifications

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

3.5 Section IV: Additional Information

3.5.1 Bidder's Proposed Sites or Premises Requiring Safeguarding Measures

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

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

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

3.6 Exchange Rate Fluctuation

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

ATTACHMENT 1 TO PART 3, PRICING SCHEDULE

The Bidder must complete this pricing schedule and include it in its financial bid. The Bidder must insert its quoted firm all-inclusive per diem rate for each of the Consultant Categories identified. The following table will be used in the financial evaluation.

The Bidder's financial proposal must be submitted in Canadian dollars, GST/HST extra, and include FOB destination, Customs duties and excise taxes. The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

Note to Bidders: The proposed firm all-inclusive per diem rate for any given resource category included in the Bidder's financial proposal must be priced sequentially, meaning that:

- i. the per diem rate for the Project Manager, must be priced higher than the Evaluation Support Specialist Category 1
- ii. the per diem rate for the Evaluation Support Specialist Category 2, may be priced equal to the Project Manager but must not be priced less than the Evaluation Support Specialist Category 1
- iii. the per diem rate(s) for the Evaluation Support Specialist Category 1 must be priced higher than the Senior Consultant
- iv. the per diem rate for the Senior Consultant, must be priced higher than the Consultant
- v. the per diem rate for the Consultant, must be priced higher than the Project Coordinator

The inclusion of the estimated level of effort (in days) volumetric data has been provided purely for information purposes to assist Bidders in preparing their bids. It does not represent a commitment by Canada that Canada's future usage of the services described in the bid solicitation will be consistent with this data.

Contract Period: April 1, 2021 to March 31, 2026 (5 Years)			
(A)	(B)	(C)	(D)
Consultant Category	Firm all-inclusive per diem rate, GST/HST extra (in Cdn \$)	Estimated level of effort (in days)	Total Cost (in Cdn \$) (B X C)
Project Manager	\$	240	\$
Evaluation Support Specialist – Category 2	\$	240	\$
Evaluation Support Specialist – Category 1	\$	240	\$

Senior Consultant	\$	240	\$
Consultant	\$	240	\$
Project Coordinator	\$	240	\$
Sub-total (Total Bid Price)			\$
Applicable Taxes			\$
Total			\$

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 evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) In addition to any other time periods established in the bid solicitation:
 - i. **Requests for Clarifications:** If Canada seeks clarification or verification from the Bidder about its bid, the Bidder will have 2 working days (or a longer period if specified in writing by the Contracting Authority) to provide the necessary information to Canada. Failure to meet this deadline will result in the bid being declared non-responsive.
 - ii. **Requests for Further Information:** If Canada requires additional information in order to do any of the following pursuant to the Section entitled "Conduct of Evaluation" in 2003, Standard Instructions - Goods or Services - Competitive Requirements:
 - A. verify any or all information provided by the Bidder in its bid; or
 - B. contact any or all references supplied by the Bidder (e.g., references named in the résumés of individual resources) to verify and validate any information submitted by the Bidder,

The Bidder must provide the information requested by Canada within two (2) working days of a request by the Contracting Authority.
 - iii. **Extension of Time:** If additional time is required by the Bidder, the Contracting Authority may grant an extension in his or her sole discretion.

4.2 Technical Evaluation

- a. **Mandatory Technical Criteria:**

Each bid will be reviewed to determine whether it meets the mandatory requirements of the bid solicitation. Any element of the bid solicitation that is identified specifically with the words "must" or "mandatory" is a mandatory requirement. Bids that do not comply with each and every mandatory requirement will be considered non-responsive and be disqualified. The Mandatory evaluation criteria are described in Attachment 1 to Part 4, Technical Evaluation Criteria.
- b. **Point-Rated Technical Criteria:**

Each bid will be rated by assigning a score to the rated requirements, which are identified in the bid solicitation by the word "rated" or by reference to a score. Bidders who fail to submit complete bids with all the information requested by this bid solicitation will be rated accordingly. The rated requirements are described in Attachment 1 to 4, Technical Evaluation Criteria.

c. Reference Checks:

- i. **If** a reference check is performed, Canada will conduct the reference check in writing by e-mail. Canada will send all email reference check requests to contacts supplied by all the Bidders within a 48-hour period using the email address provided in the bid. Canada will not award any points unless the response is received within five (5) working days of the date that Canada's email was sent.
- ii. On the third working day after sending out the reference check request, if Canada has not received a response, Canada will notify the Bidder by email, to allow the Bidder to contact its reference directly to ensure that it responds to Canada within five (5) working days. If the individual named by a Bidder is unavailable when required during the evaluation period, the Bidder may provide the name and email address of an alternate contact person from the same customer. Bidders will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Bidder will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The Bidder will have 24 hours to submit the name of a new contact. That contact will again be given five (5) working days to respond once Canada sends its reference check request.
- iii. Points will not be allocated and/or a bidder will not meet the mandatory experience requirement (as applicable) if (1) the reference customer states he or she is unable or unwilling to provide the information requested, or (2) the customer reference is not a customer of the Bidder itself (for example, the customer cannot be the customer of an affiliate of the Bidder instead of being a customer of the Bidder itself). Nor will points be allocated or a mandatory met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Bidder.
- iv. Whether or not to conduct reference checks is discretionary. However, if Canada chooses to conduct reference checks for any given rated or mandatory requirement, it will check the references for that requirement for all bidders to be recommended for contract award.

d. Number of Resources Evaluated:

Only a certain number of resources will be evaluated as part of this bid solicitation as identified in Attachment 1 to Part 3. Additional Resources will only be assessed after contract award once specific tasks are requested of the Contractor. After contract award, the Task Authorization process will be in accordance with Part 7 - Resulting Contract Clauses, the Article titled "Task Authorization".

When a Task Authorization Form (TA Form) is issued, the Contractor will be requested to propose a resource to satisfy the specific requirement based on the TA Form's Statement of Work. Should a replacement resource be proposed that resource will be assessed against the criteria identified in the Resources Assessment Criteria and Response Table in Appendix D to Annex A of the Contract. They must meet all the mandatory evaluation criteria and achieve a score in the point-rated criteria that is the same as or higher than the resource originally proposed

4.3 Financial Evaluation

Unless otherwise specified in the RFP, the financial evaluation will be conducted by calculating the Total Bid Price using the Pricing Tables completed by the bidders. The Bidder must provide firm, all inclusive, per diem rates for the Categories of Personnel being proposed in accordance with the bid solicitation.

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

4.4 Substantiation of Professional Services Rates

In Canada's experience, bidders will from time to time propose rates at the time of bidding for one or more categories of resources that they later refuse to honor, on the basis that these rates do not allow them to recover their own costs and/or make a profit. When evaluating the rates for professional services bid, Canada may, but will have no obligation to, require price support for any rates proposed (either for all or for specific resource categories). Examples of price support that Canada would consider satisfactory include:

- a. documentation (such as billing records) that shows that the Bidder has recently provided and invoiced another customer (with whom the Bidder deals at arm's length) for services similar to the services that would be provided by the relevant resource category, where those services were provided for at least one month and the fees charged are equal to or less than the rate offered to Canada (to protect the privacy of the customer, the Bidder may black out the customer's name and personal information on the invoice submitted to Canada);
- b. a signed contract between the Bidder and an individual qualified (based on the qualifications described in this bid solicitation) to provide services under the relevant resource category, where the amount payable under that contract by the Bidder to the resource is equal to or less than the rate bid for that resource category;
- c. a signed contract with a subcontractor who will perform the work under any resulting contract, which provides that the required services will be provided at a rate that is equal to or less than the rate bid for the relevant resource category (and where the resource meets all the qualifications described in this bid solicitation); or
- d. details regarding the salary paid to and benefits provided to the individuals employed by the Bidder qualified (based on the qualifications described in this bid solicitation) to provide services under the relevant resource category, where the amount of compensation, when converted to a per diem or hourly rate (as applicable), is equal to or less than the rate bid for that resource category.

Once Canada requests substantiation of the rates bid for any resource category, it is the sole responsibility of the Bidder to submit information (either the information described in the examples above, or other information that demonstrates that it will be able to recover its own costs based on the rates it has proposed) that will allow Canada to determine whether it can rely, with confidence, on the Bidder's ability to provide the required services at the rates bid, while, at a minimum, recovering its own costs.

Where Canada determines that the information provided by the Bidder does not demonstrate the Bidder's ability to recover its own costs in providing the relevant resource, Canada may declare the bid non-compliant, if the rate bid is at least 15% lower than the median price bid by compliant bidders for the resulting contract for the relevant resource(s).

4.5 Basis of Selection - Highest Combined Rating of Technical Merit 70% and Price 30%

- 4.5.1 To be declared responsive, a bid must:
- (a) comply with all the requirements of the bid solicitation;
 - (b) meet all the mandatory evaluation criteria; and
 - (c) obtain the required minimum number of points specified in Attachment 1 to Part 4 for the point rated technical criteria.
- 4.5.2 Bids not meeting (a) or (b) or (c) will be declared non-responsive. Neither the responsive bid obtaining the highest number of points nor the one with the lowest evaluated price will necessarily be accepted.
- 4.5.3 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.
- 4.5.4 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 %.
- 4.5.5 To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.
- 4.5.6 For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
- 4.5.7 The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract. In the event two or more responsive bids have the same highest combined rating of technical merit and price, the responsive bid that obtained the highest overall score for all the point rated technical criteria detailed in Attachment 1 to Part 4 will be recommended for award of a contract.
- 4.5.8 The table below illustrates an example where the selection of the contractor is determined by a 70/30 ratio of the technical merit and price, respectively.

Basis of Selection - Highest Combined Rating of Technical Merit (70%) and Price (30%)			
Bidder	Bidder 1	Bidder 2	Bidder 3
Overall Technical Score	88	82	92
Bid Evaluated Price	C\$60,000	C\$55,000	C\$50,000
Calculations	Technical Merit Points	Price Points	Total Score
Bidder 1	$88 / 100 \times 70 = 61.6$	$50,000^*/60,000 \times 30 = 25.00$	86.60
Bidder 2	$82 / 100 \times 70 = 57.4$	$50,000^*/55,000 \times 30 = 27.27$	84.67
Bidder 3	$92 / 100 \times 70 = 64.4$	$50,000^*/50,000 \times 30 = 30.00$	94.40

* represents the lowest Bid evaluated price

**ATTACHMENT 1 TO PART 4
TECHNICAL EVALUATION CRITERIA**

1.0 Instructions

A) At bid closing, the Bidder must submit only:

- one (1) Project Manager
- one (1) Evaluation Support Specialist Category 1
- one (1) Senior Consultant
- one (1) Consultant
- one (1) Project Coordinator

Required resources who were not assessed at bid closing and who are proposed in response to a TA will be evaluated in accordance with the evaluation criteria for the resource category for which they are being proposed.

B) To demonstrate their compliance with the mandatory criteria, the Bidder must complete and submit with their proposal the following grid for each project required to demonstrate the proposed resource's experience.

Item	Submission Requirements
a)	Client Organization Name for which the work was performed.
b)	Project Description
c)	Project Duration (start and completion dates in month/year to month/year).
d)	The role or overall responsibility of the proposed resource.
e)	A description of the specific work and tasks performed by the proposed resource that clearly demonstrates their experience and how they meet the criterion.

C) For each proposed resource, the Bidder should submit the name along with the phone number and/or email address of at least one client reference who can confirm, if requested by Canada, the facts identified in the Bidder's bid to demonstrate the proposed resource's compliance with the evaluation criteria below.

The Crown reserves the right to validate all information provided in the bid.

D) When calculating months of experience for criteria, the bidder may count the full duration of a project even if it overlaps with other projects. The bidder must clearly demonstrate that ALL elements of the evaluation criteria are met. Unless otherwise specified, the experience required may have been gained across multiple projects.

1.1. Mandatory Technical Criteria

The bid must meet the mandatory technical criteria specified below. The Bidder must provide the necessary documentation to clearly demonstrate compliance with this requirement. **Simply repeating the statement contained in the bid solicitation is not sufficient.**

Any bid which fails to meet the mandatory technical criteria will be declared non-responsive. Each mandatory technical criterion should be addressed separately.

Additional Info:

Government of Canada refers to federal, provincial/territorial, or municipal level. Crown corporations, agencies, etc will also be accepted.

Evaluation and Performance Information Profile are defined in Appendix A: Definitions of the *Policy on Results*, as are other terms relevant to this request for proposal: <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300>

This definition will apply to all references of Evaluation and Performance Information Profile.

Performance Measurement and related terms are defined in the Organization for Economic Cooperation and Development's GLOSSARY OF KEY TERMS IN EVALUATION AND RESULTS BASED MANAGEMENT: <https://unsdg.un.org/sites/default/files/OECD-Glossary-of-Key-Terms-in-Evaluation-and-Results-based-Management-Terminology.pdf>

M1. Corporate Criteria

No.	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M1.1	<p>The Bidder must demonstrate that it has completed a minimum of two (2) evaluations, one of which must have been for the Government of Canada, in the last 60 months. Both evaluations must include all of the phases identified below:</p> <ul style="list-style-type: none"> i. Planning an Evaluation ii. Collecting Data iii. Analyzing Data iv. Reporting on the evidence <p><i>Please see section 1.0 - B, C and D for additional information</i></p>		

M2. Project Manager

Resource Name:			
No.	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M2.1	<p>The Bidder must demonstrate that the proposed resource holds one of the following certifications:</p> <ul style="list-style-type: none"> i. Credentialed Evaluator (CE) from the Canadian Evaluation Society ii. Certified Management Consultant (CMC) iii. Project Management Professional (PMP) 		
M2.2	<p>The Bidder must demonstrate that the proposed resource has a minimum of 72 months of experience in the last 120 months, at the time of bid closing, performing all of the following:</p> <ul style="list-style-type: none"> v. Planning an Evaluation vi. Collecting Data vii. Analyzing Data viii. Reporting on the evidence ix. Developing elements related to or in support of performance information profiles <p><i>Please see section 1.0 - B, C and D for additional information</i></p> <p>Further rated under R2</p>		
M2.3	<p>The Bidder must demonstrate that the proposed resource has managed a minimum of three (3) concurrent* evaluations** or performance measurement activities in the last 60 months, at the time of bid closing.</p> <p>*For the engagements to be considered concurrent, all three evaluations or performance measurement activities must overlap by a minimum of 2 months.</p> <p>**An evaluation may include all or any of the following phases: planning, data collection, analysis, reporting.</p>		

M3. Evaluation Support Specialist – Category 1

Resource Name:			
No.	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M3.1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 48 months of experience in the last 120 months, at the time of bid closing, performing all of the following:</p> <ul style="list-style-type: none"> i. Developing methodologies for qualitative and quantitative data collection ii. Assessing data iii. Recommending alternatives or solutions to address data weaknesses iv. Developing data collection strategies <p><i>Please see section 1.0 - B, C and D for additional information</i></p> <p>Further rated under R3</p>		

M4. Senior Consultant

Resource Name:			
No.	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M4.1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 36 months of experience in the last 120 months, at the time of bid closing, performing all of the following:</p> <ul style="list-style-type: none"> i. Planning an Evaluation ii. Collecting Data iii. Analyzing Data iv. Reporting on the evidence v. Developing elements related to or in support of performance information profiles <p><i>Please see section 1.0 - B, C and D for additional information</i></p> <p>Further rated under R4</p>		

M5. Consultant

Resource Name:			
No	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M5.1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 12 months of experience in the last 120 months, at the time of bid closing, performing or supporting the performance of all of the following:</p> <ul style="list-style-type: none"> i. Planning an Evaluation ii. Collecting Data iii. Analyzing Data iv. Reporting on the evidence v. Developing elements related to or in support of performance information profiles <p><i>Please see section 1.0 - B, C and D for additional information</i></p> <p>Further rated under R5</p>		

M6. Project Coordinator

Resource Name:			
No	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to Proposal
M6.1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 6 months of experience in the last 120 months, at the time of bid closing, performing all of the following:</p> <ul style="list-style-type: none"> i. General project administration ii. Setting up meetings iii. Organizing interviews iv. Note-taking and summaries <p><i>Please see section 1.0 - B, C and D for additional information</i></p>		

NOTE: At the time of Task Authorization Issuance, an Evaluation Support Specialist – Category 2, will be evaluated against the evaluation criteria below. The bidder is not required to submit a resource in this category at the time of bid closing.

M7. Evaluation Support Specialist – Category 2

Resource Name:			
No.	Mandatory Criteria	Met/Not Met	Substantiating Information, Cross Reference to CV
M7.1	<p>The Bidder must demonstrate that the proposed resource has a minimum of 60 months of non-overlapping experience within the last 120 months in the required field of specialization.</p> <p>Areas of Specialization may include but are not limited to:</p> <ul style="list-style-type: none"> • People management, • Financial management • Government wide initiatives • Public policy • Transformation or modernization initiatives • Human resource management • Organizational theory or design • Statistics • Governance • Performance measurement • Values and ethics • Security • Regulatory affairs. 		

1.2 Point Rated Technical Criteria

Bids which meet all the mandatory technical criteria will be evaluated and scored as specified in the tables inserted below. The Bidder must provide the necessary documentation to clearly demonstrate compliance with this requirement. Simply repeating the statement contained in the bid solicitation is not sufficient.

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.

R1. Corporate Criteria

No.	Description	Point Allocation	Score	Substantiating Information, Cross Reference to Proposal
R1	<p>The Bidder should describe their processes used to ensure quality and adherence to the Standards on Evaluation in the following phases:</p> <ul style="list-style-type: none"> i. Planning: ii. Design: iii. Analysis: iv. Reporting <p><i>Appendix C: Standard on Evaluation within the Policy on Results</i> https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31306</p>	<p>For each phase, a maximum of 5 points are available as per the rating scale below.</p> <p>A maximum of 20 points are available for this criterion.</p>	/20	
<u>R1 Corporate Criteria rating scale</u>				
0 points	Information provided does not address the criteria.			
1 point	Information provided demonstrates a minimal understanding that is relevant to the stated criteria.			
2 points	Information provided demonstrates some understanding that is relevant to the stated criteria but does not demonstrate a full range of understanding for all elements of the rated criteria.			
3 points	Information provided demonstrates understanding for most but not all of the elements of the rated criteria.			
4 points	Information provided demonstrates understanding that is relevant to all of the elements of the rated criteria.			
5 points	Rated criteria is dealt with in depth, information provided is comprehensive and demonstrates a full range of understanding of all of the elements of the rate criteria.			

R2. Project Manager

Resource Name:				
No.	Description	Point Allocation	Score	Substantiating Information, Cross Reference to Proposal
R2	Based on the projects submitted under M2.2, the Bidder should demonstrate the proposed resource's experience in the following areas:			
a)	<p>Managed* any phase** of an Evaluation or Performance Measurement project for the Government of Canada in the following areas:</p> <ul style="list-style-type: none"> i. People Management ii. Financial Management iii. Transformation or modernization initiatives iv. Information Management or Information Technology; v. Regulatory affairs. <p>*Managed is defined as the act of leading the project and being responsible for the deliverables.</p> <p>**The phases of an evaluation include planning, data collection, analysis and reporting.</p>	<p>2 points will be awarded per area.</p> <p>No one project can cover more than 2 areas.</p>	/10	
b)	<p>Conducted Evaluations* of:</p> <ul style="list-style-type: none"> i. National or Enterprise Strategies where the scope is Government Wide ii. Policies or Policy Centres <p>*An Evaluation engagement may include all or any phase of the evaluation (planning, data collection, analysis, reporting).</p>	<p>2 out of 2 = 10 points 1 out of 2 = 5 points 0 out of 2 = 0 points</p>	/10	

c)	<p>Completed an Evaluation or Performance Measurement project in the last 60 months, where the resource had to, mid-project, adapt the methodology used to meet challenging business needs. The description must include the following aspects:</p> <ul style="list-style-type: none"> i. Considerations ii. Complexities or challenges iii. Impacts of the decisions on outcomes. 	<p>For each aspect, a maximum of 5 points are available as per the rating scale below.</p> <p>A maximum of 15 points are available for this criterion.</p>	/15	
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R2 c) Project Manager rating scale

0 points	Information provided does not address the criteria.
1 point	Information provided demonstrates a minimal understanding that is relevant to the stated criteria.
2 points	Information provided demonstrates some understanding that is relevant to the stated criteria but does not demonstrate a full range of understanding for all elements of the rated criteria.
3 points	Information provided demonstrates understanding for most but not all of the elements of the rated criteria.
4 points	Information provided demonstrates understanding that is relevant to all of the elements of the rated criteria.
5 points	Rated criteria is dealt with in depth, information provided is comprehensive and demonstrates a full range of understanding of all of the elements of the rate criteria.

R3. Evaluation Support Specialist – Category 1

Resource Name:				
No.	Description	Point Allocation	Score	Substantiating Information, Cross Reference to Proposal
R3	Based on the projects submitted under M3.1, the Bidder should demonstrate the proposed resources' experience in the following areas:			
a)	<p>Designing Data Collection Methodologies</p> <p>Note: In addition to the requested Project Information listed in Section 1.0 Instruction to Bidders, items a) to e) of the Submission requirements, for each project the Bidder should also provide</p> <p>f) a description of the data collection methodologies developed; and</p> <p>g) why these methodologies were selected based on the overall goal.</p>	<p>3+ projects = 5 points 2 projects = 3 points 1 project = 2 point 0 projects = 0 points</p>	/5	
b)	<p>Developing the following data collection tools:</p> <ul style="list-style-type: none"> i. Surveys ii. Guides iii. Questionnaires iv. Templates v. Tables vi. Costing models 	<p>3 or more out of 6 = 5 points 2 out of 6 = 3 points 1 out of 6 = 1 point 0 out of 6 = 0 points</p>	/5	
c)	<p>Performing the following:</p> <ul style="list-style-type: none"> a. Assessing data bases for integrity of info and proposing a solution to augment b. Assessing data bases for reliability of info and proposing a solution to augment 	<p>a. Assessing data bases for integrity of info and proposing a solution to augment</p> <p><u>Description provided demonstrates:</u></p> <ul style="list-style-type: none"> i. steps followed to assess the data base(s), - 1 point ii. the findings – 1 point 	/10	

		<ul style="list-style-type: none"> iii. issues with the integrity of the information – 1 point iv. impacts of not correcting – 1 point v. solution(s) recommended to correct or augment performance – 1 point <p>b. Assessing data bases for reliability of info and proposing a solution to augment</p> <p><u>Description provided demonstrates:</u></p> <ul style="list-style-type: none"> i. steps followed to assess the data base(s),- 1 point ii. the findings – 1 point iii. issues with the reliability of the information – 1 point iv. impacts of not correcting – 1 point v. solution(s) recommended to correct or augment performance – 1 point 		
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R4. Senior Consultant

Resource Name:				
No.	Description	Point Allocation	Score	Substantiating Information, Cross Reference to Proposal
R4	Based on the projects submitted under M4.1, the Bidder should demonstrate the proposed resource's experience in the following areas:			
a)	<p>Conducted any phase* of an evaluation or performance measurement activity for the Government of Canada in the following areas:</p> <ul style="list-style-type: none"> i. People Management ii. Financial Management iii. Government wide initiatives iv. Public Policy v. Transformation or modernization initiatives vi. Information Management or Information Technology; vii. Regulatory affairs. <p>*The phases of an evaluation include planning, data collection, analysis and reporting.</p>	<p>2 points will be awarded per area.</p> <p>No one project can cover more than 2 areas.</p>	/14	
b)	<p>In a lead role* working on evaluation projects where the resource developed the following:</p> <ul style="list-style-type: none"> i. Logic models ii. performance measures or indicators iii. evaluation strategy <p>*lead role is defined as the person responsible for the development of the deliverables.</p>	<p>i. Logic models</p> <p>2+ projects = 3 points 1 project = 2 point 0 projects = 0 points</p> <p>ii. Performance measures or indicators</p> <p>2+ projects = 3 points 1 project = 2 point 0 projects = 0 points</p> <p>iii. Evaluation Strategies</p> <p>2+ projects = 3 points 1 project = 2 point 0 projects = 0 points</p>	/9	

R5. Consultant

Resource Name:				
No	Description	Point Allocation	Score	Substantiating Information, Cross Reference to Proposal
R5	Based on the projects submitted under M5.1, the Bidder should demonstrate the resources's experience in the following areas:			
a)	Performing the following: <ul style="list-style-type: none"> i. Data Collection ii. Data Analysis iii. Compilation of the results of the data analysis 	i.Data Collection 2+ projects = 3 points 1 project = 2 point 0 projects = 0 points ii.Data Analysis 2+ projects = 3 points 1 project = 2 point 0 projects = 0 points iii.Compilation of the results of the data analysis: 2+ projects = 3 points 1 project = 2 point 0 projects = 0 points	/9	
b)	Performing the following: <ul style="list-style-type: none"> i. Supporting the design of performance measurement products ii. Supporting the design of evaluation frameworks 	i. Supporting the design of performance measurement strategies 2+ projects = 3 points 1 project = 2 point 0 projects = 0 points ii. Supporting the design of evaluation frameworks 2+ projects = 3 points 1 project = 2 point 0 projects = 0 points	/6	

Total Points Available	113
Minimum Pass Mark	73
Bidder's Score	/113

1.3 **Mandatory Financial Criteria**

Bids must meet the mandatory financial criteria specified in the table inserted below.

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

Mandatory Financial Criteria (MF)		
Number	Description	Met / Not Met
MF1	the per diem rate for the Project Manager, must be priced higher than the Evaluation Support Specialist Category 1	
MF2	the per diem rate for the Evaluation Support Specialist Category 2, may be priced equal to the Project Manager but must not be priced less than the Evaluation Support Specialist Category 1	
MF3	the per diem rate(s) for the Evaluation Support Specialist Category 1 must be priced higher than the Senior Consultant	
MF4	the per diem rate for the Senior Consultant, must be priced higher than the Consultant	
MF5	the per diem rate for the Consultant, must be priced higher than the Project Coordinator	

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 BID

Bidders must submit the following duly completed certification(s) as part of their bid.

a. Declaration of Convicted Offences

As applicable, pursuant to subsection Declaration of Convicted Offences of section 01 of the Standard Instructions, the Bidder must provide with its bid, a completed Declaration Form (<http://www.tpsgc-pwgsc.gc.ca/ci-if/documents/formulaire-form-eng.pdf>), to be given further consideration in the procurement process.

5.2 FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – BID CERTIFICATION

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list (http://www.labour.gc.ca/eng/standards_equity/eq/emp/fcp/list/inelig.shtml) available from *Employment and Social Development Canada (ESDC) - Labour's website*

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

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.

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.

5.3 PROFESSIONAL SERVICES RESOURCES

- a. By submitting a bid, the Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives.
- b. By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.
- c. If the Bidder is unable to provide the services of an individual named in its bid due to the death, sickness, extended leave (including parental leave or disability leave), retirement, resignation or dismissal for cause of that individual, within five business days of Canada's knowledge of the unavailability of the individual the Bidder may propose a substitute to the Contracting Authority, providing:
 - A. the reason for the substitution with substantiating documentation acceptable to the Contracting Authority;
 - B. the name, qualifications and experience of a proposed replacement immediately available for work; and
 - C. proof that the proposed replacement has the required security clearance granted by Canada, if applicable.

No more than one substitute will be considered for any given individual proposed in the bid. In response to the Bidder's proposed substitution, the Contracting Authority may elect in its sole discretion either to:

- A. set aside the bid and give it no further consideration; or
- B. evaluate the replacement in accordance with the requirements of the bid solicitation in the place of the original resource as if that replacement had originally been proposed in the bid, with any necessary adjustments being made to the evaluation results, including the rank of the bid vis-à-vis other bids.

If no substitute is proposed the Contracting Authority will set aside the bid and give it no further consideration.

- d. If the Bidder has proposed any individual who is not an employee of the Bidder, by submitting a bid, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability. Failure to comply with the request may result in the bid being declared non-responsive.

5.4 CERTIFICATION OF LANGUAGE

By submitting a bid, the Bidder certifies that, should it be awarded a contract as result of the bid solicitation, every individual proposed in its bid will be fluent in both or either Canada's official languages (French and / or English) as required at the time of TA issuance. The individual(s) proposed must be able to communicate orally and in writing in French and / or English without any assistance and with minimal errors.

5.5 EDUCATION AND EXPERIENCE

By submitting a bid, the Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

5.6 ADDITIONAL CERTIFICATIONS PRECEDENT TO CONTRACT AWARD

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

5.6.1 Former Public Servant

Contracts with 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 with FPS, bidders must provide the information required below.

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 FPS 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 Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **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 reduction 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 \$5,000.00, including Applicable Taxes.

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.

Name of Supplier's Authorized Signatory

Signature of Supplier's Authorized Signatory

Date

5.6.2 Federal Contractors Program For Employment Equity – Certification

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: _____(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- () A1. The Bidder certifies having no work force in Canada.
- () A2. The Bidder certifies being a public sector employer.
- () A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- () A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
 - () A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

OR

- () A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

B. Check only one of the following:

- () B1. The Bidder is not a Joint Venture.

OR

- () B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:
 - (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
 - (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites;
 - (d) the Bidder's proposed location of work performance and document safeguarding must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses;
 - (e) the Bidder must provide the addresses of proposed sites or premises of work performance and document safeguarding as indicated in Part 3 - Section IV Additional Information.
2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.
3. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.
4. In the case of a joint venture bidder, each member of the joint venture must meet the security requirements.

PART 7 - RESULTING CONTRACT CLAUSES

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

7.1 REQUIREMENT

- a. [] (the Contractor) **(TO BE PROVIDED AT CONTRACT AWARD)** agrees to supply to the Client the services described in the Contract, including the Statement of Work, in accordance with and at the prices set out in the Contract.
- b. **Client(s):** Under the Contract, the "**Client**" is Treasury Board of Canada Secretariat.
- c. **Reorganization of Client:** The Contractor's obligation to perform the Work will not be affected by (and no additional fees will be payable as a result of) the renaming, reorganization, reconfiguration, or restructuring of any Client. The reorganization, reconfiguration and restructuring of the Client includes the privatization of the Client, its merger with another entity, or its dissolution, where that dissolution is followed by the creation of another entity or entities with mandates similar to the original Client. In connection with any form of reorganization, Canada may designate another department or government body as the Contracting Authority or Technical Authority, as required to reflect the new roles and responsibilities associated with the reorganization.
- d. **Defined Term:** Words and expressions defined in the General Conditions or Supplemental General Conditions and used in the Contract have the meanings given to them in the General Conditions or Supplemental General Conditions. Also, the following words and expressions have the following meaning:
 - i. Any reference to an Identified User is a reference to the Client.
 - ii. "deliverable" or "deliverables" includes all documentation outlined in this Contract
 - iii. "local office" of the Contractor means an office having at least one full time employee that is not a shared resource working at that location.

7.2 Task Authorization (TA)

A) As-and-when-requested Task Authorizations:

The Work or a portion of the Work to be performed under the Contract will be on an "as-and-when-requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The Contractor must not commence work until a validly issued TA has been issued by Canada and received by the Contractor. The Contractor acknowledges that any work performed before such issuance and receipt will be done at the Contractor's own risk.

B) Task Authorization Process:

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization Form" specified in Appendix C to Annex A.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis (bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority, within two to three (2-3) working days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.

4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

C) Approval Process

If Canada approves the Contractor's task response, Canada (by its authorized representative, as described in this contract) will issue the TA by forwarding a fully signed copy of the final TA form to the Contractor. Whether or not to approve or issue a TA is entirely within Canada's discretion.

D) Task Authorization Limit and Authorities for Validly Issuing Task Authorizations:

To be validly issued, a TA must include the following signatures:

- (i) for any TA with a value less than or equal to \$0.00 (including Applicable Taxes), the TA must be signed by the Technical Authority and the Contracting Authority (or his/her representative from the TBS Procurement & Contracting Unit) and the Contractor; and
- (ii) for any TA with a value greater than this amount, a TA must be signed by the Technical Authority and the Contracting Authority (or his/her representative from the TBS Procurement & Contracting Unit) and the Contractor.

Any TA that does not bear the appropriate signature(s) is not validly issued by Canada.

Any work performed by the Contractor without receiving a validly issued TA is done at the Contractor's own risk. If the Contractor receives a TA that is not appropriately signed, the Contractor must notify the Contracting Authority. By providing written notice to the Contractor, the Contracting Authority may suspend the Client's ability to issue TA's at any time or reduce the dollar value threshold described in sub-article (i) above; any suspension or reduction notice is effective upon receipt.

E) Contents of a TA

A Task Authorization must contain the following information, if applicable:

- (i) a task number;
- (ii) the number of resources in each category required;
- (iii) a statement of work for the task outlining the activities to be performed and identifying any deliverables;
- (iv) the duration of the task is to be carried out (start and end dates);
- (v) milestone dates for deliverables and payments (if applicable);
- (vi) the number of person-hours of effort required;
- (vii) the specific work location;
- (viii) the price payable to the Contractor for performing the task, with an indication of whether it is a firm price or a maximum TA price (and, for maximum price task authorizations, the TA must indicate how the final amount payable will be determined; where the TA does not indicate how the final amount payable will be determined, the amount payable is the amount, up to the maximum, that the Contractor demonstrates was actually worked on the project, by submitting time sheets filled in at the time of the work by the individual resources to support the charges); and
- (ix) any other constraints that might affect the completion of the task.

F) Charges for Work under a TA

The Contractor must not charge Canada anything more than the price set out in the Task Authorization unless Canada has issued a TA amendment authorizing the increased expenditure. 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 being incorporated into the Work.

G) Consolidation of TAs for Administrative Purposes

The Contract may be amended from time to time to reflect all Task Authorizations issued and approved by the Contracting Authority to date, to document the Work performed under those TAs for administrative purposes.

H) Refusal of Task Authorizations

Unless specified otherwise in the RFP, the Contractor is required to submit a response in response to every draft statement of task issued by Canada. Canada may immediately, and without further notice, terminate the Contract for default if the Contractor does not submit a response in response to a draft statement of task issued during the Contract Period.

I) Evaluation and Qualification of Replacement Resources

Any replacement resource proposed after contract award, in response to a TA, must be compliant with the associated mandatory evaluation criteria, and achieve a score in the point-rated criteria that is the same as or higher than the resource originally proposed, for the resource category under which they are being proposed as per Appendix D to Annex A, Resources Assessment Criteria And Response Table.

J) NON-DISCLOSURE AGREEMENT – Task Authorizations

By submitting a proposed resource, the contractor confirms that they have obtained from its employee(s) or subcontractor(s) their concurrence of the Non-Disclosure Agreement (NDA), attached at Appendix F to Annex A, prior to any Task Authorization Approval. The Contracting Authority may request a signed copy of the NDA at any time.

K) MINIMUM WORK GUARANTEE - TASK AUTHORIZATIONS

1. In this clause,
 - i. **"Maximum Contract Value"** means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and
 - ii. **"Minimum Contract Value"** means \$15,000.00 (excluding Applicable Taxes)
2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.
3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

L) Periodic Usage Reports - Contracts with Task Authorizations

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on a quarterly basis to the Project / Technical Authority

The quarterly periods are defined as follows:

1st quarter: April 1 to June 30;

2nd quarter: July 1 to September 30;

3rd quarter: October 1 to December 31; and

4th quarter: January 1 to March 31.

The data must be submitted to the Project / Technical Authority no later than 5 calendar days after the end of the reporting period.

7.3 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.

7.3.1 General Conditions

[2035](#) (2020-05-28), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

With respect to Section 30 - Termination for Convenience, of General Conditions 2035, unless already present, Subsection 04 is deleted and replaced with the following Subsections 04, 05 and 06:

4. The total of the amounts, to which the Contractor is entitled to be paid under this section, together with any amounts paid, due or becoming due to the Contractor must not exceed the Contract Price.
5. Where the Contracting Authority terminates the entire Contract and the Articles of Agreement include a Minimum Work Guarantee, the total amount to be paid to the Contractor under the Contract will not exceed the greater of
 - a. the total amount the Contractor may be paid under this section, together with any amounts paid, becoming due other than payable under the Minimum Revenue Guarantee, or due to the Contractor as of the date of termination, or
 - b. the amount payable under the Minimum Work Guarantee, less any amounts paid, due or otherwise becoming due to the Contractor as of the date of termination.

6. The Contractor will have no claim for damages, compensation, loss of profit, allowance arising out of any termination notice given by Canada under this section except to the extent that this section expressly provides. The Contractor agrees to repay immediately to Canada the portion of any advance payment that is unliquidated at the date of the termination.

7.4 Security Requirements

7.4.1 The following security requirements (SRCL's and related clauses provided by the Contract Security Program) apply and form part of the Contract:

Scope #1:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Facility Security Clearance at the level of **Secret**, issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC)
2. The Contractor/Offeror personnel requiring access to protected/classified information, assets or sensitive work site(s) must EACH hold a valid personnel security screening at the level of **Secret** as required, granted or approved by CISD/PSPC
3. The Contractor/Offeror must not remove any protected/classified information from the identified work site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction
4. Subcontracts which contain security requirements are not to be awarded without the prior written permission of Treasury Board of Canada Secretariat (TBS)
5. The Contractor/Offeror must comply with the provisions of the Security Requirements Check List at Annex C and the Statement of Work at Annex A.

Additionally:

- All work at the Secret level shall be conducted on TBS premises, using TBS equipment.
- All work at the Protected A or B level shall be conducted at the contractor's location / premise using a TBS issued laptop/tablet to electronically store up to Protected B information. After this device has been issued to the Contractor, this task may be performed.
- Unclassified work at the contractor's location / premise is at the discretion of the TBS project authority.

Scope #2:

1. The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer/Supply Arrangement, hold a valid Designated Organization Screening (DOS), issued by the Canadian Industrial Security Directorate (CISD), Public Works and Government Services Canada (PWGSC)
2. The Contractor/Offeror personnel requiring access to protected information, must EACH hold a valid personnel security screening at the level of **Reliability** Status
3. The Contractor must utilize TBS issued Laptop/Tablet to electronically store up to PROTECTED B information. After this device has been issued to the Contractor, this task may be performed up to the level of protected B off TBS work site
4. Subcontracts which contain security requirements are not to be awarded without the prior written permission of Treasury Board of Canada Secretariat (TBS)
5. The Contractor/Offeror must comply with the provisions of the Security Requirements Check List at Annex C and the Statement of Work at Annex A

Additionally:

- Contractor will be escorted on TBS premises

7.4.2 Contractor's Sites or Premises Requiring Safeguarding Measures

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

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

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

7.5 Term of Contract

7.5.1 Period of the Contract

The Period of the Contract is from date of Contract Award to March 31st, 2026 inclusive.

7.6 Authorities

7.6.1 Contracting Authority

The Contracting Authority for the Contract is:

(to be determined at contract award)

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

7.6.2 Project Authority

The Project Authority for the Contract is:

(to be determined at contract award)

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

7.6.3 Contractor's Representative

(to be determined at contract award)

The duties and responsibilities of the Contractor Representative includes the following:

1. Responsible for the overall management of the Contract;
2. Ensure that the Contract is administered in accordance with the terms and conditions of the Contract;
3. Act as a single point of contact to resolve any contractual disputes that may arise. The Contract Representative must have direct access to the level of management within the Contractor's organization vested with the decision-making authority for contractual matters;
4. Shall be established as the only recognized individual from the Contractor's organization to speak on behalf of the Contractor for purposes of Contract management;
5. Monitor all resources that are providing services/deliverables in accordance with the Contract;
6. Liaise with the Project Authority on all matters concerning technical aspects of the Work and performance of its resources; and
7. Manage the transition of any potential resource(s) turnover during the period of the Work.

7.7 Payment

7.7.1 Basis of Payment

One or more of the basis of payment options below will be specified in each TA:

a) Firm Price TA

In consideration of the Contractor satisfactorily completing all of its obligations under the approved TA, the Contractor will be paid the firm price stipulated in the approved TA, as determined in accordance with the basis of payment, in Annex B. Customs duty is included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

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 TA Approval Authority before their incorporation into the Work.

b) TA subject to a Limitation of Expenditure

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the approved TA, as determined in accordance with the basis of payment, in Annex B, to the limitation of expenditure specified in the approved TA.

Canada's total liability to the Contractor under the approved TA must not exceed the limitation of expenditure specified in the approved TA. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

No increase in the liability of Canada or in the price of the Work specified in the approved TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the TA Approval Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the TA Approval Authority. The Contractor must notify the TA Approval Authority in writing as to the adequacy of this sum:

- (a) when it is 75 percent committed, or
- (b) four (4) months before the final delivery date specified in the approved TA, or
- (c) as soon as the Contractor considers that the approved TA funds are inadequate for the completion of the Work specified in the approved TA,

whichever comes first.

If the notification is for inadequate approved TA funds, the Contractor must provide to the TA Approval Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.7.2 Pre-Authorized Travel and Living Expenses

Canada will reimburse the Contractor for pre-authorized reasonable and proper travel and living expenses incurred to perform the Work, without any allowance for overhead or profit, and these costs will be reimbursed in accordance with the Treasury Board Travel Directive in effect at the time: http://www.tbs-sct.gc.ca/travel/travel_e.html.

All travel must be pre-approved by the Project / Technical Authority. While there is no travel expected in the conduct of the work, each Task Authorization will describe any travel, if required and will be reviewed and approved in advance by the Project / Technical Authority.

7.8 Competitive Award:

The Contractor acknowledges that the Contract has been awarded as a result of a competitive process. No additional charges will be allowed to compensate for errors, oversights, misconceptions or underestimates made by the Contractor when bidding for the Contract.

7.9 Professional Services Rates:

In Canada's experience, bidders from time to time propose rates at the time of bidding for one or more Resource types that they later refuse to honour, on the basis that these rates do not allow them to recover their own costs and/or make a profit. This denies Canada of the benefit of the awarded contract. If the Contractor does not respond or refuses to provide an individual with the qualifications described in the Contract (or proposes instead to provide someone from an alternate category at a different rate), whether or not Canada terminates the Contract as a whole, Canada may impose sanctions or take other measures in accordance with the PWGSC Vendor Performance Policy (or equivalent) then in effect, which may include an assessment that results in conditions applied against the Contractor to be fulfilled before doing further business with Canada, or full debarment of the Contractor from bidding on future requirements.

7.10 Purpose of Estimates:

All estimated costs contained in the Contract are included solely for the administrative purposes of Canada and do not represent a commitment on the part of Canada to purchase services in these amounts. Any commitments to purchase specific amounts or values of services are described elsewhere in the Contract.

7.11 CANADA'S TOTAL RESPONSIBILITY

7.11.1 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$2,000,000.00 Customs duties are excluded, and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
 - a. when it is 75 percent committed, or
 - b. four (4) months before the contract expiry date, or
 - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,

whichever comes first.

4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

7.12 METHODS OF PAYMENT - APPROVED TA

The following methods of payment will form part of the approved TA:

7.12.1 For a Firm Price TA:

A Single Payment

For the Work specified in an approved firm price TA:

Canada will pay the Contractor upon completion and delivery of the Work or upon completion and delivery of milestone deliverables in accordance with the payment provisions of the Contract if:

- a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b) all such documents have been verified by Canada;
- c) the Work delivered has been accepted by Canada.

B Milestone Payments

- a) Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:
- b) an accurate and complete claim for payment and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- c) all required certificates have been signed by the respective authorized representatives; all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

7.12.2 Limitation of Expenditure Price TAs:

For the Work specified in an approved TA subject to a limitation of expenditure or ceiling price:

A Single Payment

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada;
- (c) the Work delivered has been accepted by Canada.

B Monthly Payments

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada;
- (c) the Work performed has been accepted by Canada.

7.13 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

(to be determined at Contract award)

- a. Direct Deposit (Domestic and International);
- b. Wire Transfer (International Only);

7.14 Time Verification

C0711C – Time Verification (2008-05-12):

Time charged and the accuracy of the Contractor's time recording system are subject to verification by Canada, before or after payment is made to the Contractor. If verification is done after payment, the Contractor must repay any overpayment, at Canada's request.

7.15 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 time sheets to support the time claimed (if required);
- b. a copy of the release document and any other documents as specified in the Contract (if required);
- c. a copy of the invoices, receipts, and vouchers for all direct expenses (if required);
- d. a copy of the monthly progress report (if required).

2. Invoices must be sent electronically via email to:

(to be determined at contract award)

7.16 Certifications and Additional Information

7.16.1 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.

7.16.2 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.

7.17 Applicable Laws

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

7.18 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. these Articles of Agreement, including any individual SACC clauses incorporated by reference in these Articles of Agreement;
- b. General Conditions 2035 (2020-05-28) High Complexity - Services;
- c. Annex A, Statement of Work;
- d. Annex B, Basis of Payment;
- e. Annex C, Security Requirements Check List;
- f. The signed Task Authorizations including any required Certifications;
- g. the Contractor's bid dated _____ **(to be inserted at contract award)**.

7.19 Foreign Nationals (Canadian Contractor **OR** Foreign Contractor)

SACC Manual clause [A2000C](#) _____ (*insert date*) Foreign Nationals (Canadian Contractor)

OR

SACC Manual clause [A2001C](#) _____ (*insert date*) Foreign Nationals (Foreign Contractor)

7.20 Insurance

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

7.21 No Responsibility to Pay for Work Not Performed Due to Closure Of Government Offices

- i. Where the Contractor, its employees, subcontractors, or agents are providing services on government premises under the Contract and those premises are inaccessible because of the evacuation or closure of government offices, and as a result no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if there had been no evacuation or closure.
- ii. If, as a result of any strike or lock-out, the Contractor or its employees, subcontractors or agents cannot obtain access to government premises and, as a result, no work is performed, Canada is not responsible for paying the Contractor for work that otherwise would have been performed if the Contractor had been able to gain access to the premises.

7.22 Safeguarding Electronic Media

- a. Before using them on Canada's equipment or sending them to Canada, the Contractor must use a regularly updated product to scan electronically all electronic media used to perform the Work for computer viruses and other coding intended to cause malfunctions. The Contractor must notify Canada if any electronic media used for the Work are found to contain computer viruses or other coding intended to cause malfunctions.
- b. If magnetically recorded information or documentation is damaged or lost while in the Contractor's care or at any time before it is delivered to Canada in accordance with the Contract, including accidental erasure, the Contractor must immediately replace it at its own expense.

7.23 Access to Canada's Property and Facilities

Canada's property, facilities, equipment, documentation, and personnel are not automatically available to the Contractor. If the Contractor would like access to any of these, it is responsible for making a request to the Technical Authority. Unless expressly stated in the Contract, Canada has no obligation to provide any of these to the Contractor. If Canada chooses, in its discretion, to make its property, facilities, equipment, documentation or personnel available to the Contractor to perform the Work, Canada may require an adjustment to the Basis of Payment and additional security requirements may apply.

7.24 Transition Services at End of Contract Period

The Contractor agrees to execute the transition tasks identified in the Statement of Work, in the period leading up to the end of the Contract Period, and it will make all reasonable efforts to assist Canada in the transition from the Contract to a new contract with another supplier.

7.25 Identification Protocol Responsibilities

The Contractor will be responsible for ensuring that each of its agents, representatives or subcontractors (hereinafter referred to as Contractor Representatives) complies with the following self-identification requirements:

- a. Contractor Representatives who attend a Government of Canada meeting (whether internal or external to Canada's offices) must identify themselves as a Contractor Representative prior to the commencement of the meeting, to ensure that each meeting participant is aware of the fact that the individual is not an employee of the Government of Canada;
- b. During the performance of any Work at a Government of Canada site, each Contractor Representative must be clearly identified at all times as being a Contractor Representative; and
- c. If a Contractor Representative requires the use of the Government of Canada's e-mail system in the performance of the Work, then the individual must clearly identify him or herself as an agent or subcontractor of the Contractor in all electronic mail in the signature block as well as under "Properties." This identification protocol must also be used in all other correspondence, communication, and documentation.
- d. If Canada determines that the Contractor is in breach of any obligation stated in this Article, upon written notice from Canada the Contractor must submit a written action plan describing corrective measures it will implement to eliminate the recurrence of the problem. The Contractor will have five working days to deliver the action plan to the Client and the Contracting Authority, and twenty working days to rectify the underlying problem.
- e. In addition to any other rights it has under the Contract, Canada may terminate the Contract for default if the corrective measures required of the Contractor described above are not met.

7.26 Proactive Disclosure of Contracts with Former Public Servants

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

7.27 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".

ANNEX A - STATEMENT OF WORK

1.0 TITLE

Evaluation, research, strategic support and performance measurement services.

2.0 OBJECTIVE

Treasury Board of Canada Secretariat (TBS) requires the services of a Contractor to support the Internal Audit and Evaluation Bureau (IAEB) with evaluation and performance measurement activities as defined in the 2016 Treasury Board (TB) *Policy on Results*. Strategic support and research services will also be required.

3.0 BACKGROUND

TBS is the administrative arm of the Treasury Board (TB). TBS has a dual mandate: to support TB as a committee of ministers and to fulfill the statutory responsibilities of a central government agency. The IAEB at TBS assists the Secretariat in achieving its strategic objectives by providing neutral, evidence-based evaluations of TBS's activities as a department and as a central agency.

The TBS Five-Year Integrated Audit and Evaluation Plan identifies the intended evaluations, research and performance measurement activities of the evaluation function, as required in the 2016 TB *Policy on Results*. The Plan is updated on an annual basis, which results in some projects shifting onto or off the plan or moving within the Schedule of Planned Activities

The *2016 Treasury Board Policy on Results* positions evaluation as a tool to support senior management decision-making by providing an evidence-based, neutral assessment of the value for money (relevance, effectiveness and efficiency) of programs. Its objectives are to improve the achievement of results across government and enhance the understanding of the results government seeks to achieve, does achieve, and the resources used to achieve them.

In the next five years, IAEB anticipates having a number of evaluations, research and performance measurement activities, including approximately 9 upcoming evaluation engagements.

4.0 SCOPE OF WORK - Scope 1 and Scope 2

On an "as and when requested" basis, through the issuance of Task Authorizations (TA) the Contractor will provide resources to support IAEB in undertaking all or part of the development of evaluations, components of performance information profiles such as indicators, logic models, strategic support or research of TBS programs and initiatives. It may require the Contractor to work with different TBS sectors on research or performance measurement related activities.

The attached Table 1 is an excerpt from TBS's 2020-25 Integrated Audit and Evaluation Plan. The table presents the currently planned IAEB evaluation engagements to indicate the types of projects that may be undertaken. IAEB updates this plan annually, at a minimum, so the list is subject to revision.

Table 1: List of currently planned evaluation projects

Evaluable Unit
Office of Public Sector Accessibility
Free Agent Program
Research and Policy Initiatives Assistance Program
Executive Leadership Development Program
Access to Information
Centre for Diversity, Wellness & Inclusion
Classification Program
Centre for Regulatory Innovation & Capacity Fund
Federal Contaminated Sites Action Plan

The Contractor may be required to work independently, in collaboration with the IAEB evaluation team, or with other Sector representatives.

Regardless of the Background and Context sections above, should a requirement for work from another TBS sector align with the tasks and deliverables of this contract, IAEB may, at its discretion, leverage resources from this contract to support and assist with that requirement.

5.0 PERSONNEL REQUIREMENTS

5.1 Scope 1

Based on the planned activities in the Integrated Audit and Evaluation Plan, the following resources may be required:

Resource Category	Estimated Quantity	Security
Project Manager	1	Secret
Senior Consultant	3	Secret
Consultant	2	Secret
Evaluation Support Specialist – Category 1	1	Secret
Project Coordinator	1	Secret

While the estimated number of resources is 8, this may fluctuate up or down depending on operational requirements outlined by IAEB within each TA, the number of engagements running concurrently and the complexity of the engagements.

Resources working under Scope 1 may access documents up to security clearance level of SECRET.

5.2 Scope 2

Based on the planned activities in the Integrated Audit and Evaluation Plan, the following resources may be required:

Resource Category	Estimated Quantity	Security
Evaluation Support Specialist – Category 2	To be determined at TA issuance	Reliability

The estimated number of Evaluation Support Specialists cannot be predicted, as these will depend on operational requirements, the number of engagements running concurrently and the complexity of the engagements.

Resources working under Scope 2 may access documents up to security clearance level of PROTECTED B only.

6.0 TASKS – Scope 1 and 2

Each Task Authorization will identify the specific tasks that must be performed. The tasks that would fall under Scope 1 and Scope 2 are not different. However, in the conduct of those tasks, resources under Scope 2 are limited to accessing documents at the security clearance level of PROTECTED B.

The Contractor may be required to perform, but is not limited to, the following:

6.1 Evaluation

Conduct or participate in aspects of:

- Developing evaluation plans
- Identifying areas of calibration or adjustment of the level of effort in the use of evaluation approaches and designs tailored to a program, policy centre or initiative's characteristics to take into account risk and the quality of performance information available
- Planning specific evaluations, evaluation approaches (i.e. rapid impact evaluation) and related studies of individual programs, policies, policy centres, or initiatives
- Developing terms of reference for evaluation projects
- Developing, reviewing or validating evaluation framework(s) in consultation with IAEB and other TBS stakeholders. An evaluation framework identifies the evaluation approach, the data requirements and resources, and may include, but is not limited to the following:
 - identifying the initial evaluation questions covering the five core evaluation issues (continued need for program, alignment with government priorities, alignment with federal roles and responsibilities, achievement of expected outcomes-effectiveness, demonstration of efficiency and economy)
 - identifying indicators- qualitative or quantitative means of measuring an output or outcome with the intention of gauging the performance of a program
 - identifying data sources and methods of data collection
 - determining baseline data needs to be collected and timelines for data collection
 - providing a description of simple adjustments that can be made to administrative protocols and procedures by the program area to ensure that the evaluation's data requirements are met
- Developing, reviewing or validating the evaluation work plan in consultation with IAEB. An evaluation work plan includes a detailed description of the activities, deliverables and timelines of the evaluation approach. It may include but is not limited to evaluation design, data collection, analysis, and reporting

- Developing, reviewing or validating logic models, program theory of change models and related activities in consultation with IAEB and other TBS stakeholders
- Developing, testing and undertaking data collection and analysis using a variety of qualitative and social science methodologies such as case studies, group consultations, key informant interviews, literature reviews, document reviews, observation method, and quantitative methodologies such as cost-benefit analyses, questionnaires (web, phone, intercept, mail), financial forecasting, statistical analyses and modelling
- Collecting and reviewing background documentation pertaining to the program or initiative
- Collecting and analyzing benchmark data
- Collecting and analyzing administrative data and supporting data analytics
- Interviewing representatives at TBS as well as other departments and agencies who were involved in the specific evaluable unit
- Producing various technical reports that present the result of the evaluation process and which may include but is not limited to:
 - interviews
 - document reviews
 - questionnaires (Web, phone, intercept, mail)
 - data collection, collection tools
 - administrative data analysis
 - literature reviews
 - methodology reports, findings and limitations
 - recommendations about program relevance, performance and alternative ways to deliver the initiative
- Producing detailed evidence matrices, which consolidate raw data by line of evidence and evaluation issue to enable comparisons and support analysis and reporting
- Validating evaluation approaches, methodologies, findings, conclusions and recommendations, using methods such as but not limited to validation with participants, organizations and conducting expert panels, or peer reviews
- Incorporating feedback and refining draft products (research reports, matrices, guides)
- Preparing and delivering PowerPoint presentations outlining the findings, conclusions and recommendations to senior officials
- Conducting and writing syntheses or meta-evaluations
- Conducting quality assurance or peer reviews of evaluation products
- Providing support in the compilation and analysis of lessons learned and best practices

6.2 Performance Measurement:

Conduct or participate in aspects of:

- Developing or refining performance information profiles for but not limited to:
 - Setting out an objective basis for collecting information related to programs
 - Identify strategic outcomes, expected results of programs, performance indicators and associated targets
 - Identify data sources and data collection frequency and actual data collection for each indicator
- Planning and designing performance measures in support of the Departmental Results Framework and in support of program monitoring and evaluation
- Developing methodological approaches and designs for performance measurement of programs, services, policies, policy centres and initiatives
- Developing performance measurement and monitoring tools and instruments for project, program and policy reviews, assessments or evaluations
- Planning logic model and indicator development workshops to support the creation of performance information profiles
- Supporting or advising in the development of information management systems associated with program or departmental performance information profiles
- Analysing program databases
- Researching performance measurement uses and practices in other jurisdictions (includes provincial and international jurisdictions).
- Incorporating feedback and refining draft products (logic model¹, indicators, profile)

6.3 Research:

Conduct or participate in aspects of:

- Planning and designing of (evaluation type, social science-based) targeted research that answers management's needs, but which may not conform to the *Policy on Results* and its accompanying Directives and Standards
- Developing methodological approaches and questions for research related to TBS services, policies, policy centres and initiatives
- Developing research collection tools and instruments such as interview guides, literature review templates, costing models, multi-jurisdictional analysis tables, document review templates
- Administering data collection tools and instruments to conduct research
- Analyzing and reporting on findings from data collection for the purposes of targeted research
- Incorporating feedback and refining draft products (research reports, matrices, guides)
- Communicating preliminary and draft final findings at meetings with the project authority using PowerPoint presentations and Word documents

6.4 Strategic Support

- Advising on approaches, designing collection tools and collecting data via interviews and document reviews to inform the mapping of evaluable units within the Secretariat and supporting updates to the Integrated Audit and Evaluation Plan
- Supporting the drafting of annual follow-up reports on evaluation recommendations to illustrate evaluation impacts within the Secretariat
- Assisting in the analysis or development of evaluation related materials that support the management of the evaluation function within TBS

7.0 DELIVERABLES

Each Task Authorization will specify the deliverables to be produced.

The Contractor may be required to deliver, but is not limited to, the following:

- Evaluation plans
- Evaluation work plans
- Evaluation approaches and products
- Terms of reference
- Evaluation frameworks
- Lines of Inquiry
- Indicators – qualitative and quantitative
- Data sources, methods of data collection, data collection tools
- Logic models
- Theory of Change models
- Evaluation and evidence matrices
- Annual Follow Up reports
- Performance information profiles and their components (i.e. indicators, evaluation strategies)
- Lessons and best practices documents
- Working papers
- Interview guides and survey questionnaires
- Interview transcripts
- Jurisdictional review templates
- Document review templates
- Technical reports including but not limited to:
 - Interviews
 - Document Reviews
 - Questionnaires (web, phone, intercept, mail)
 - Data Analysis
 - Administrative Data Analysis and data analytics
 - Literature Reviews
 - Methodology, findings and limitations
 - Recommendations
- Research reports
- Draft evaluation reports
- Quality assurance templates or peer review reports
- Evaluable units i.e. evaluation universe
- Departmental Evaluation Plan
- PowerPoint presentations

7.1 Format of Deliverables

Each TA will identify the specific format of the deliverables.

The Contractor may be required to provide the deliverables in, but is not limited to, the following formats.

- In soft or hard copy
- Using TBS Templates
- In accordance with the:
 - *Policy on Results*
 - *Directive on Results including:*
 - Mandatory Procedures for Evaluation
 - Standard on Evaluation
 - *Values and Ethics Code for the Public Sector*
- Microsoft Office 365 or compatible version
- MAXQDA, MS Visio, MS Project, TeamMate (access to the required software can be made available to the contractor on site at TBS)
- PowerPoint

As new versions are released or new technologies are adopted, the resources may be required to work in those versions.

8.0 LANGUAGE OF WORK

Each Task Authorization will specify the language of work required.

The work may be conducted in both official languages, English and French. At a minimum the Senior Consultant or Project Manager must be fluent* in both English and French. The other resources must be fluent* in English.

* Oral:

Able to use the language fluently and accurately on all levels normally pertinent to professional needs. Language usage and ability to function are fully successful. Can tailor language to audience and discuss in depth highly abstract or unfamiliar topics. Able to speak with a great deal of fluency, grammatical accuracy, complex vocabulary and in an idiomatic fashion. Understands all forms and styles of speech and shows strong sensitivity to social and cultural references.

Reading:

Able to read fluently and accurately all styles and forms of the language in any subject as well as those pertinent to professional needs. Understands all sociolinguistic and cultural references. Can follow unpredictable turns of thought readily in editorial, conjectural, and literary texts, as well as in materials in own special field, including official documents and correspondence.

Written:

Able to write the language precisely and accurately in a variety of prose pertinent to social issues and professional needs. Errors of grammar, syntax, punctuation and vocabulary are rare. Writing is consistently and explicitly organized with appropriate connectors and discourse devices (ellipsis, parallelisms, subordinates).

9.0 WORK LOCATION AND TRAVEL

Each Task Authorization will specify the work location.

All work at the Secret level must be conducted on TBS premises, using TBS approved IT equipment.

All work at the Protected A or B level may be conducted at the contractor's location / premises using a TBS issued laptop/tablet to electronically store up to Protected B information. After this device has been issued to the Contractor, this task may be performed.

Meetings, consultations and review of certain hard-copy files may be conducted on TBS premises.

While there is no travel expected, each TA will detail any travel requirements.

10.0 GOVERNMENT FURNISHED EQUIPMENT, INFORMATION AND RESPONSIBILITIES

During the contract period, the Contractor's resources will be provided with a TBS user ID credential, password, workstation or laptop or tablet, and other materials as required in order to process, store and/or transmit TBS data on the TBS network and all required project documentation, software and licenses required to access the departmental IT systems necessary to perform the work.

It is the responsibility of TBS to ensure that resources under Scope 2 are only given access to documents up to the security clearance level of PROTECTED B.

Note: Phones will not be provided. It is not the responsibility of the Treasury Board of Canada Secretariat to provide portable communication devices to consultants.

11.0 APPLICABLE DOCUMENTS

Policy on Results

<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300>

Directive on Results

<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31306>

Values and Ethics Code for the Public Sector

<https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=25049>

As updates to these documents are issued or new documents are released, the Contractor must adhere to them.

12.0 CONSTRAINTS

At no time and in no way is TBS data to be removed from TBS sites, nor will access to or from the Contractor's IT systems through the use of a session or link (e.g. VPN) via personal systems (non-TBS assets) be permitted. The Contractor must comply with TBS internal security policies, directives, standards and guidelines at all times during the contract.

The TBS's working hours are between 07:00 to 18:00 Monday through Friday, except for Statutory Holidays where Government Offices are closed. These are core hours and are not representative of the duration of a Contractor's workday. All proposed personnel must be available to work outside normal office hours during the duration of the Contract. The Technical/Project Authority will advise the Contractor as soon as possible of any required work outside standard working hours.

13.0 REPORTING AND COMMUNICATION

In addition to the timely submission of all deliverables and fulfillment of obligations specified within the Contract, it is the responsibility of the resources to facilitate and maintain regular communication with the Project Authority. Status updates, verbal or written, may be requested by the Project Authority over the course of the contract. Communication is defined as all reasonable effort to inform all parties of plans, decisions, proposed approaches, implementation, and results of work, to ensure that the project is progressing well and in accordance with expectations. Communication may include phone calls, electronic mail, and teleconference/video meetings. In addition, the resources are to immediately notify the Project Authority of any issues, problems or areas of concern in relation to any work completed under the contract, as they arise.

14.0 SECURITY REQUIREMENTS

14.1 Scope 1

The Contractor's resources that fall under Scope 1 must retain a valid security clearance at the level of SECRET.

14.2 Scope 2

The Contractor's resources that fall under Scope 2 (Evaluation Support Specialist - Category 2) must retain a valid security clearance at the level of RELIABILITY. Resources in this scope may NOT have access to documents classified above PROTECTED B.

It is the responsibility of TBS to ensure that resources under Scope 2 are only given access to documents up to the security clearance level of PROTECTED B.

APPENDIX A TO ANNEX A GLOSSARY

Departmental Results Framework	Consists of the department's Core Responsibilities, Departmental Results and Departmental Result Indicators. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Effectiveness	The impacts of a program, policy or other entity, or the extent to which it is achieving its expected outcomes. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Efficiency	The extent to which resources are used such that a greater level of output/outcome is produced with the same level of input or, a lower level of input is used to produce the same level of output/outcome. The level of input and output/outcome could be increases or decreases in quantity, quality, or both. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Evaluable Unit	Refers to each unit or focus of evaluation.
Evaluation	In the Government of Canada, evaluation is the systematic and neutral collection and analysis of evidence to judge merit, worth or value. Evaluation informs decision making, improvements, innovation and accountability. Evaluations typically focus on programs, policies and priorities and examine questions related to relevance, effectiveness and efficiency. Depending on user needs, however, evaluations can also examine other units, themes and issues including alternatives to existing interventions. Evaluations generally employ social science research methods. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Logic Model	A logic model is a depiction of the causal or logical relationship between the inputs, activities, outputs and outcomes of a given policy, program or initiative. Source: Supporting Effective Evaluations: A Guide to Developing Performance Measurement Strategies http://www.tbs-sct.gc.ca/cee/dpms-esmr/dpms-esmrtb-eng.asp
Performance Information Profile	The document that identifies the performance information for each Program from the Program Inventory. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300 Supporting Effective Evaluations: A Guide to Developing Performance Measurement Strategies http://www.tbs-sct.gc.ca/cee/dpms-esmr/dpms-esmr11-eng.asp#App3

Program	Individual or groups of services, activities or combinations thereof that are managed together within the department and focus on a specific set of outputs, outcomes or service levels. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Program Inventory	Identifies all of the department's programs and describes how resources are organized to contribute to the department's Core Responsibilities and Results. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300
Relevance	The extent to which a program, policy or other entity addresses and is responsive to a demonstrable need. Relevance may also consider if a program, policy or other entity is a government priority or a federal responsibility. Source: Policy on Results Appendix A https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=31300

**APPENDIX B TO ANNEX A
TASKING ASSESSMENT PROCEDURE**

1. Where a requirement for a specific task is identified, a draft Task Authorization Form (TA Form) as attached at **Appendix C to Annex A** will be provided to the Contractor. Once a draft TA Form is received, the Contractor must submit to the Technical Authority a quotation of rates to supply the requested Resource Categories based on the information identified in the TA Form. The quotation must be signed and submitted to Canada within the time for response identified in the TA Form. The Contractor will be given a minimum of 48 hours turnaround time to submit a quotation.
2. For each proposed new or replacement resource the Contractor must supply a résumé, the requested security clearance information and must complete the Response Tables at **Appendix C to Annex A** applicable to the Resource Categories identified in the draft TA. The same individual must not be proposed for more than one Resource Category. The résumés must demonstrate that each proposed individual meets the qualification requirements described (including any educational requirements, work experience requirements, and professional designation or membership requirements). With respect to the proposed resources:
 - (i) Proposed resources may be employees of the Contractor or employees of a subcontractor, or these individuals may be independent contractors to whom the Contractor would subcontract a portion of the Work. (**Refer to Appendix E to Annex A, Certifications**).
 - (ii) For educational requirements for a particular degree, designation or certificate, Canada will only consider educational programmes that were successfully completed by the resource before the date the draft TA was first issued to the Contractor.
 - (iii) For requirements relating to professional designation or membership, the resource must have the required designation or membership by the time of draft TA issuance and must continue, where applicable, to be a member in good standing of the profession or membership throughout the assessment period and Contract Period. Where the designation or membership must be demonstrated through a certification, diploma or degree, such document must be current, valid and issued by the entity specified in this Contract or if the entity is not specified, the issuer must have been an accredited or otherwise recognized body, institution or entity at the time the document was issued.
 - (iv) For work experience, Canada will not consider experience gained as part of an educational programme, except for experience gained through a formal co-operative programme at a post-secondary institution.
 - (v) For any requirements that specify a particular time period (e.g., 2 years) of work experience, Canada will disregard any information about experience if the résumé does not include the relevant dates (month and year) for the experience claimed (i.e., the start date and end date). Canada 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.
 - (vi) A résumé must not simply indicate the title of the individual's position but must demonstrate that the resource has the required work experience by explaining the responsibilities and work performed by the individual while in that position. Only listing experience without providing any supporting data to describe responsibilities, duties and relevance to the requirement, or reusing the same wording as the TA Form, will not be considered "demonstrated" for the purposes of the assessment. The Contractor should provide complete details as to where, when, month and year, and how, through which activities/responsibilities, the stated qualifications / experience were obtained. In situations in which a proposed resource worked at the same time on more than one

project, the duration of any overlapping time period will be counted only once toward any requirements that relate to the individual's length of experience.

3. The qualifications and experience of the proposed resources will be assessed against the requirements set out in Attachment 1 to Part 4, Evaluation Criteria to determine each proposed resource's compliance with the mandatory and rated criteria. Canada may request proof of successful completion of formal training, as well as reference information. Canada may conduct reference checks to verify the accuracy of the information provided. If reference checks are done, they will be conducted in writing by e-mail (unless the contact at the reference is only available by telephone). Canada will not assess any points or consider a mandatory criterion met unless the response is received within 5 working days. On the third working day after sending out the e-mails, if Canada has not received a response, Canada will notify the Contractor by e-mail, to allow the Contractor to contact its reference directly to ensure that it responds to Canada within 5 working days. Wherever information provided by a reference differs from the information supplied by the Contractor, the information supplied by the reference will be the information assessed. Points will not be allocated, or a mandatory criterion considered as met if the reference customer is not a customer of the Contractor itself (for example, the customer cannot be the customer of an affiliate of the Contractor). Nor will points be allocated or a mandatory criterion considered as met if the customer is itself an affiliate or other entity that does not deal at arm's length with the Contractor. Crown references will be accepted.
4. During the assessment of the resources proposed, should the references for two or more resources required under that TA either be unavailable or fail to substantiate the required qualifications of the proposed resources to perform the required services, the Contracting Authority may find the quotation to be non-responsive.
5. Only quotations that meet all of the mandatory criteria will be considered for assessment of the point rated criteria. Each resource proposed must attain the required minimum score for the point rated criteria for the applicable Resource Category. If the minimum score for any proposed resource is less than what is required, the Contractor's quotation will be found to be non-responsive.
6. Once the quotation has been accepted by the Technical Authority, the TA Form will be signed by Canada and provided to the Contractor for signature. The TA Form must be appropriately signed by Canada prior to commencement of any work. The Contractor must not commence work until a validly issued TA Form (the Task Authorization) has been received, and any work performed in its absence is done at the Contractor's own risk.

**APPENDIX C TO ANNEX A
TASK AUTHORIZATION FORM**

Note: This template or a similar template authorized by the Contracting Authority may be use during the contract period

TASK AUTHORIZATION (TA)				
Contractor:		Contract Number:		
Task Number:		Date:		
Amendment Number:		Date:		
TA Request (For completion by Technical Authority)				
1. Description of service(s) to be delivered/provided as per the Statement of Work [Insert details and ensure the description is within scope and deliverables of original contract]				
2. PERIOD OF SERVICES (mm/dd/yy)	From:		To:	
3. Work Location				
4. Other Conditions /Restrains	[] Yes [] No		Specify:	
5. Travel	[] Yes [] No		Specify:	
6. Basis of Payment	Limitation of Expenditure []		Firm Price []	
7. METHOD OF PAYMENT:				
<input type="checkbox"/> Single <input type="checkbox"/> Monthly <input type="checkbox"/> Milestones				
8. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL				
[] Reliability Status [] Secret				
9. LANGUAGE REQUIREMENT (if applicable)				
<input type="checkbox"/> English and French <input type="checkbox"/> French [] English				
TA Proposal (For completion by Technical Authority and / or Contractor)				
10. Estimated Cost Contract				
Name of Proposed Resource	PSPC Security File Number & DOB	Firm Per Diem Rate	Estimated Level of Effort (in days)	Total cost

Sub-total Professional Fees:			
GST or HST:			
Total:			
TA Approval			
11. Signing Authorities			
	Signatures of Authorized Representatives	Date	
Name & Title of Individual Authorized to Sign on Behalf of Contractor:			
Name & Title of TBS Project/Technical Authority:			
Name & Title of TBS Contracting Authority:			
12. Invoicing			
<p>Payment to be made based on receipt of a detailed invoice for services rendered, subject to acceptance by the Technical/Project Authority.</p> <p>Electronic submission of original invoices must be sent to the Technical/Project Authority identified in the Contract unless otherwise indicated in this TA.</p> <p>All invoices must be as per contract terms and conditions.</p>			
<p>Financial Coding (FC-GC-Fund-FA-IO) (to be completed by TBS)</p>			

**APPENDIX D TO ANNEX A
RESOURCES ASSESSMENT CRITERIA AND RESPONSE TABLE**

To facilitate resource assessment, Contractors must prepare and submit a response to a draft Task Authorization using the tables provided in this Appendix. When completing the resource grids, the specific information which demonstrates the requested criteria and reference to the page number of the résumé should be incorporated so that Canada can verify this information. The tables should not contain all the project information from the resume. Only the specific answer should be provided.

1.0 Mandatory Resource Assessment Criteria:

Note to Bidders: This Annex will be completed at Contract Award. The mandatory resource assessment criteria found at Attachment 1 to Part 4, Technical Evaluation Criteria will be inserted here at contract award.

2.0 Point Rated Resource Assessment Criteria:

Note to Bidders: This Annex will be completed at Contract Award. The Point Rated resource assessment criteria found at Attachment 1 to Part 4, Technical Evaluation Criteria will be inserted here at contract award.

APPENDIX E TO ANNEX A CERTIFICATIONS - TA ISSUANCE

By submitting a Proposed Resource in response to a Task Authorization (TA), the Contractor certifies the following:

1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

4. CERTIFICATION OF LANGUAGE

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in both or either of Canada's official languages (English and French). The individual(s) proposed must be able to communicate orally and in writing in French and / or English without any assistance and with minimal errors.

**APPENDIX F TO ANNEX A
NON-DISLCSURE AGREEMENT – TA ISSUANCE**

I, _____, recognize that in the course of my work as an employee or subcontractor of _____ **(to be inserted at TA issuance)**, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No. 24062-21-083 between Her Majesty the Queen in right of Canada, represented by the Treasury Board of Canada Secretariat and _____ **(to be inserted at TA Issuance)**, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No.: 24062-21-083.

**ANNEX B
BASIS OF PAYMENT**

A- Contract Period (From April 1st, 2021 to March 31, 2026 inclusive.)

During the period of the Contract, the Contractor will be paid as specified below for Work performed in accordance with the Contract.

1.0 Labour

The Contractor will be paid all-inclusive fixed time rates as follows:

Consultant Category	Firm all-inclusive per diem rate, GST/HST extra (in Cdn \$)
Project Manager	\$
Evaluation Support Specialist – Category 2	\$
Evaluation Support Specialist – Category 1	\$
Senior Consultant	\$
Consultant	\$
Project Coordinator	\$

1.1 Definition of a Day/Proration:

A day is defined as 7.5 hours exclusive of meal breaks. Payment will be for days actually worked with no provision for annual leave, statutory holidays and sick leave. Time worked which is more or less than a day will be prorated to reflect actual time worked in accordance with the following formula:

$$\frac{\text{Hours worked} / \text{applicable firm per diem rate}}{7.5 \text{ hours}}$$

- (i) All personnel must be available to work outside normal office hours during the duration of the Contract.
- (ii) No overtime charges will be authorized under the Contract. All time worked will be compensated according to paragraph above.

B- 2.0 Cost Reimbursable Expenses

2.1 Travel and Living Expenses

Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation required to satisfy the terms of the Contract.

The Contractor will be paid its authorized travel and living expenses, reasonably and properly incurred in the performance of the Work, at cost, without any allowance for overhead or profit, in accordance with the negotiated meal, private vehicle and incidental allowances specified in Appendices B, C and D of the Treasury Board Travel Directive http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tbm_113/menu-travel-voyage-eng.asp , and with the other provisions of the directive referring to “travellers”, rather than those referring to “employees”. All payments are subject to Government Audit.

All travel must have the prior authorization of the Project Authority.

All travel within the National Capital Region will be at the Contractor’s expense.

**C- Total Estimated Cost of Professional Services to a Limitation of Expenditure not to exceed:
\$_____ plus applicable taxes (to be inserted at Contract award)**


SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)
PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine TBS		2. Branch or Directorate / Direction générale ou Direction Internal Audit and Evaluation Bureau	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Treasury Board of Canada Secretariat requires the services of a Contractor to support the Internal Audit and Evaluation Bureau with evaluation and performance measurement activities as defined in the 2019 Treasury Board Policy on Results. Strategic Support and research services will also be required			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No Non	<input checked="" type="checkbox"/> Yes Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No Non	<input type="checkbox"/> Yes Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable À ne pas diffuser <input type="checkbox"/>		Restricted to: / Limité à : <input type="checkbox"/>	Restricted to: / Limité à : <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays :		Specify country(ies): / Préciser le(s) pays :	Specify country(ies): / Préciser le(s) pays :
7. c) Level of information / Niveau d'information			
PROTECTED A PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A PROTÉGÉ A <input type="checkbox"/>	
PROTECTED B PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B PROTÉGÉ B <input type="checkbox"/>	
PROTECTED C PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C PROTÉGÉ C <input type="checkbox"/>	
CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	NATO SECRET NATO SECRET <input type="checkbox"/>	CONFIDENTIAL CONFIDENTIEL <input type="checkbox"/>	
SECRET SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET SECRET <input type="checkbox"/>	
TOP SECRET TRÈS SECRET <input type="checkbox"/>		TOP SECRET TRÈS SECRET <input type="checkbox"/>	
TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) TRÈS SECRET (SIGINT) <input type="checkbox"/>	



Contract Number / Numéro du contrat 24062-21-083 Scope #1
Security Classification / Classification de sécurité UNCLASSIFIED

PART A (continued) / PARTIE A (suite)

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

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate? No / Non Yes / Oui

Short Title(s) of material / Titre(s) abrégé(s) du matériel :
Document Number / Numéro du document :

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input checked="" type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET-SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMBLEMES | | | |

Special comments:
Commentaires spéciaux : _____

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

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui

If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)

INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



Contract Number / Numéro du contrat 24062-21-083 Scope #1
Security Classification / Classification de sécurité UNCLASSIFIED

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens / Production																
IT Media / Support TI																
IT Link / Lien électronique																

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

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

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

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



Contract Number / Numéro du contrat 24062-21-083 Scope #2
Security Classification / Classification de sécurité UNCLASSIFIED

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

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE

1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine TBS		2. Branch or Directorate / Direction générale ou Direction Internal Audit and Evaluation Bureau (IAEB)	
3. a) Subcontract Number / Numéro du contrat de sous-traitance		3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Treasury Board of Canada Secretariat requires the services of a contractor to support the Internal Audit and Evaluation Bureau with evaluation and performance measurement activities as defined in the 2016 Treasury Board Policy on Results. Strategic support and research services will also be required.			
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis			
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)		<input type="checkbox"/> No / Non	<input checked="" type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès			
Canada <input checked="" type="checkbox"/>		NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion			
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>		All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:		Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information			
PROTECTED A / PROTÉGÉ A <input checked="" type="checkbox"/>		NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input checked="" type="checkbox"/>		NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>		NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>		NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET <input type="checkbox"/>		COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>			TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>			TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

**PART A (continued) / PARTIE A (suite)**

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

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

PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

- | | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> RELIABILITY STATUS
COTE DE FIABILITÉ | <input type="checkbox"/> CONFIDENTIAL
CONFIDENTIEL | <input type="checkbox"/> SECRET
SECRET | <input type="checkbox"/> TOP SECRET
TRÈS SECRET |
| <input type="checkbox"/> TOP SECRET-SIGINT
TRÈS SECRET - SIGINT | <input type="checkbox"/> NATO CONFIDENTIAL
NATO CONFIDENTIEL | <input type="checkbox"/> NATO SECRET
NATO SECRET | <input type="checkbox"/> COSMIC TOP SECRET
COSMIC TRÈS SECRET |
| <input type="checkbox"/> SITE ACCESS
ACCÈS AUX EMBLEMES | | | |

Special comments:

Commentaires spéciaux : _____

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.

REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail? No / Non Yes / Oui
If Yes, will unscreened personnel be escorted?
Dans l'affirmative, le personnel en question sera-t-il escorté? No / Non Yes / Oui

PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC? No / Non Yes / Oui

PRODUCTION

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ? No / Non Yes / Oui

INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS? No / Non Yes / Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale? No / Non Yes / Oui



Contract Number / Numéro du contrat 24062-21-083 Scope #2
Security Classification / Classification de sécurité UNCLASSIFIED

PART C - (continued) / PARTIE C - (suite)

For users completing the form **manually** use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire **manuellement** doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form **online** (via the Internet), the summary chart is automatically populated by your responses to previous questions.

Dans le cas des utilisateurs qui remplissent le formulaire **en ligne** (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens / Production																
IT Media / Support TI																
IT Link / Lien électronique																

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

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

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

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

ANNEX D - ELECTRONIC PAYMENT INSTRUMENTS

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- Direct Deposit (Domestic and International);
- Wire Transfer (International Only);

ANNEX E - BID SUBMISSION FORM

BID SUBMISSION FORM		
Bidder's full legal name		
Authorized Representative of Bidder for evaluation purposes (e.g., clarifications)	Name:	
	Title:	
	Address:	
	Telephone #:	
	Email:	
Bidder's Procurement Business Number (PBN) [see the Standard Instructions 2003] [Note to Bidders: Please ensure that the PBN you provide matches the legal name under which you have submitted your bid. If it does not, the Bidder will be determined based on the legal name provided, not based on the PBN, and the Bidder will be required to submit the PBN that matches the legal name of the Bidder.]		
Jurisdiction of Contract: Province or territory in Canada the Bidder wishes to be the legal jurisdiction applicable to any resulting contract (if other than as specified in solicitation)		
Former Public Servants See the Article in Part 2 of the bid solicitation entitled Former Public Servant for a definition of "Former Public Servant".	Is the Bidder a FPS in receipt of a pension as defined in the bid solicitation? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
	Is the Bidder a FPS who received a lump sum payment under the terms of the Work Force Adjustment Directive? Yes ____ No ____ If yes, provide the information required by the Article in Part 2 entitled "Former Public Servant"	
Security Clearance Level of Bidder [include both the level and the date it was granted]		

<p>[Note to Bidders: Please ensure that the security clearance matches the legal name of the Bidder. If it does not, the security clearance is not valid for the Bidder.]</p>		
<p>On behalf of the Bidder, by signing below, I confirm that I have read the entire bid solicitation including the documents incorporated by reference into the bid solicitation and I certify that:</p> <ol style="list-style-type: none"> 1. The Bidder considers itself and its proposed resources able to meet all the mandatory requirements described in the bid solicitation; 2. This bid is valid for the period requested in the bid solicitation; 3. All the information provided in the bid is complete, true and accurate; and 4. If the Bidder is awarded a contract, it will accept all the terms and conditions set out in the resulting contract clauses included in the bid solicitation. 		
<p>Signature of Authorized Representative of Bidder</p>		